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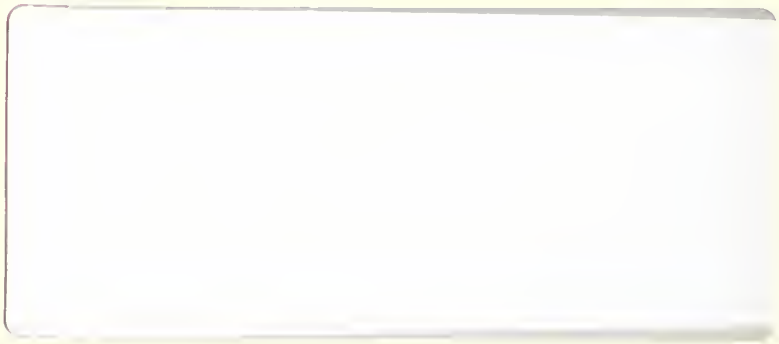

MONTANA TOURISM
MARKETING DEVELOPMENT PLAN

VOLUME I

THE TOURISM PRODUCT AND HOW IT IS VIEWED

Prepared For:

MONTANA TRAVEL PROMOTION UNIT

December 1980

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PREFACE

This report covering the marketing research and resulting planning recommendations is issued in three volumes as follows:

Volume I: The Tourism Product And How It Is Viewed. This volume reports the results of the research efforts undertaken concerning what Montana has to offer and how tourists and the trade view it as a vacation destination.

Volume II: Management Summary And Recommendations. This volume summarizes the findings and presents the recommended marketing development plan.

Volume III: Size And Composition Of The Current Market. This volume presents projections of current visitor flows as derived from the surveys of the United States and Canadian prime markets.

In addition, detailed tabulations of the survey data from the prime market and the Canadian prime market surveys have been provided under separate covers.

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INTRODUCTION

INTRODUCTION

A. Purpose

The overall aim of this study is to devise a plan for public and private development of domestic and international tourism in Montana for the five year period beginning with Federal Fiscal Year 1981. The scope of this project includes all aspects of the tourism marketing effort -- advertising, merchandising, strategic planning, product development, and research. Our goal is to provide Montana with a workable, attainable program for taking advantage of its tourism potential in order to improve the economic well-being of the state.

Specifically, the research goals are:

...To provide a picture of Montana's tourism markets which will allow us:

- to improve Montana's position in those markets;
- to identify new markets which offer potential for development; and
- to suggest ways in which those markets might be exploited.

...To assess the tourism product in Montana so that:

- improvements might be made where necessary; and
- strengths might be identified and promoted.

...To profile Montana's image in its current markets in order to:

- assess the state's level of awareness among consumers and the travel trade;
- identify the strengths and weaknesses of Montana perceived by these groups; and
- determine the interest in visiting Montana on a pleasure trip.

...To assess the potential for development of Montana as a competitive vacation destination by:

- identifying those markets which are most attractive for development; and
- outlining steps required to achieve that potential.

...To compare the costs involved in this effort with the benefits to be gained based on:

- an estimate of the public and private investment required; and
- the potential benefits in income and employment.

B. What Was Done

The first step in our research was to examine the sources of information already available. In this phase, we looked at information concerning:

...Tourism in Montana;

...Current tourism trends in the United States generally and mountain states specifically that might affect Montana;

...International pleasure travel trends to the United States; and

...Recent developments in air, bus, train and automobile travel that would have an impact on Montana tourism.

More than fifty organizations and individuals were contacted in this effort. Contact was made with federal and state tourism organizations, international and domestic travel industry groups, transportation suppliers and organizations, and universities. The specific sources contacted are listed in the Appendix. Also included is a list of the publications reviewed.

Unfortunately, but not surprisingly, much of the data available are either outdated or not directly applicable to understanding tourism in Montana. For example, some data that were not available included:

...The awareness, knowledge, and image of Montana among potential tourists;

...The view of Montana among the travel trade and the issues related to its development as a vacation destination;

...Interest in visiting Montana among consumers and the trade; and

...The view of Montana among the travel trade in foreign countries, and the obstacles to developing further business for Montana in those markets.

In order to address these needs for information, Davidson-Peterson Associates designed and executed five phases of primary research for the state of Montana:

...Focused group discussions with U.S. tourists;

...Telephone interviews with 505 tourists in the United States prime market;

...Telephone interviews with 100 vacationers in the Canadian prime market;

...Personal interviews with 37 members of the domestic travel trade; and

...Personal interviews with 37 representatives of foreign sources of tourism from seven countries.

In total, this research project included the interviewing of more than 700 individuals who are either tourists or directly involved in the tourism industry. Each of the five primary research phases will now be explained in detail.

1. Focused Group Sessions

One focused group session was held in order to have vacationers talk in more detail than is possible in a questionnaire about their views of Montana as a vacation destination. Respondents were male and female residents of the Los Angeles area who had spent at least one night in the past two years or so on a pleasure trip in a mountain state or province. The session was conducted on September 17, 1980. A copy of the screening questionnaire is included in the Appendix.

In addition, other focused group sessions were held during September and October in several sections of the country in connection with other Davidson-Peterson Associates research projects. These sessions offered an additional opportunity to learn something about awareness of and attitudes toward Montana.

2. U.S. Prime Market Tourist Survey

A telephone study of U.S. tourists was conducted to learn about consumers' awareness, knowledge, and image of Montana as a vacation destination, and to identify the characteristics of those most likely to visit Montana.

Between September 9 and 21, 1980, 505 adults were interviewed who identified themselves as the primary trip planner and reported taking a past-year pleasure trip lasting at least one night away from home. The interviews were conducted from a supervised, central telephone facility designed specifically for interviewing. The questionnaire is included in the Appendix.

All respondents were residents of states or areas defined for the purposes of this survey as part of the U.S. prime market. This determination was based on the survey of non-resident travelers conducted for the Old West Regional Commission and the Montana Travel Study prepared by the University of Montana. The states and areas selected for study were those which accounted for substantial proportions of non-resident travelers in Montana. The number of interviews in each area is proportional to the tourist population in each area. The U.S. prime market areas and the number of interviews in each are as follows:

# Interviews	Location
140	Northern California
72	Oregon
98	Washington
19	Idaho
33	Utah
8	Wyoming
65	Colorado
11	North Dakota
13	South Dakota
46	Minneapolis/St. Paul (SMSA)
505	

Northern California was defined as those counties in the San Francisco/Oakland area and north. The specific counties included are listed in the Appendix. Minneapolis/St. Paul is considered to be the Standard Metropolitan Statistical Area (SMSA).

The purpose of this tourism project is to devise ways to increase income and employment in Montana using a source of revenue that does not require Montana's support for schools, housing and other services -- that is, non-resident tourism. Accordingly, no interviews were conducted in Montana.

In order to contact past-year tourists for interviewing in a scientific manner, 4,000 phone numbers were generated at random using the area codes and exchanges in the U.S. prime market. The amount of phone numbers in each state was proportional to its population. In other words, if 10% of the prime market population was located in a particular area, then 10% of the numbers generated were in that area also.

Phone numbers to be dialed were then selected on an every nth basis from the list by dividing the list into 505 clusters. Numbers in each cluster were called until the cluster yielded a completed interview. Up to three callbacks were attempted before another number was tried.

Interviewing was conducted during the evening hours only, to assure that those less likely to be home during the day were not under-represented. Interviews at business numbers were eliminated by calling after business hours. If the primary trip planner could not be reached, only the number of past-year pleasure trips were recorded and another household was contacted. If there was more than one primary trip planner in the household, the one to be interviewed was chosen in a random manner. In this study, the majority of those interviewed (and therefore who identified themselves as the primary trip planner) were female (60%). This fact is consistent with other tourism studies we have conducted.

3. Canadian Prime Market Tourist Survey

In order to learn about the Canadian tourist market, the same questionnaire was administered in a similar manner in the area defined as the Canadian prime market. Edmonton and Calgary were defined as the prime market since they are the largest Canadian cities near Montana connected by relatively direct road transportation.

Between October 17 and 26, 1980, 50 telephone interviews were conducted with adult primary trip planners in each of these cities. All procedures were the same as in the U.S. survey, except that phone numbers were generated by dividing each city's metropolitan area phone book into 50 equal sections, and then selecting a specified phone number on a page in that section. A digit was added to each listed number in order to eliminate the bias of calling listed numbers only. Each number on the page was called (adding a digit) until one interview was completed in that section.

4. Domestic Trade Interviews

Personal interviews were conducted by members of the Davidson-Peterson professional staff with 37 members of the travel trade. Those contacted included regional and national tour operators and wholesalers, as well as various transportation suppliers. They were contacted between September 4 and 22, 1980. Interviews were unstructured, allowing for the format to be tailored to the particular expertise of the respondent. The question areas generally discussed included:

...What is the respondent's level of familiarity with Montana as a vacation destination? How familiar is he with similar destinations?

...What is his image of Montana -- what are the positive and negative aspects of promoting tourism there?

...What is his current involvement with Montana and competitive destinations? What is the success of that operation?

...What are the prospects for further development? What is the demand? What are the obstacles?

5. International Trade Personal Interviews

Personal interviews were also conducted with 37 members of the travel trade representing foreign sources of tourism. The interview followed the same format as that used with domestic travel trade representatives. The number of interviews conducted with those from each country are as follows:

# Interviews	Location
15	United Kingdom
8	Germany
4	Japan
3	France
2	Belgium
2	Holland
1	Austria
1	Finland
1	Canada
37	

C. Terminology

Several terms used extensively in this report have specific, technical meanings. In order to increase the ease with which they can be understood and used, we will define them here:

...Tourist -- an individual who has in the past year participated in a pleasure trip lasting at least one night away from home.

...Prime market -- the states, cities, or other areas in which tourists were interviewed in this study. The areas were selected for study due to their potential impact on Montana tourism due either to population, proximity, and/or past visitation to Montana. Their selection for interviewing does not necessarily imply that they are the best targets for promotion of Montana. However, they are potentially important enough to be examined.

...Pleasure trip -- a trip lasting at least one night away from home whose purpose is recreation, visiting friends and relatives, and the like.

...Travel -- use of transportation for any purpose, including business or personal necessity. It includes tourism, but is wider than tourism alone.

...Visitation -- pleasure travel, or tourism.

...Trip night -- a night spent away from home on a pleasure trip. Five tourists in a group spending one night away from home on a vacation trip are counted as five trip nights.

...People trip -- one person taking one pleasure trip. In other words, a tourist. One individual who takes three pleasure trips per year contributes three people trips. Thus, ten tourists (people who take pleasure trips) who each take two such trips account for 20 people trips.

...Tourist household -- a household in which at least one member takes a pleasure trip lasting one night or more away from home in the past year. Tourist households were the unit measured in this study, and the number of household tourists in each was used to estimate the number of tourists in total. Thus, three tourist households in which 1.5 tourists participated in four pleasure trips on the average would contribute 18 people trips ($3 \times 1.5 \times 4 = 18$).

D. Data

All data in this report have been collected, generated, or analyzed by Davidson-Peterson Associates, unless otherwise noted. Conclusions for which data are cited are based on the surveys just described. Where no specific figures are shown in support of the finding, the basis is the personal interview phases of the study. Other data sources used are noted at the bottom of those tables in which such data appear.

THE FINDINGS IN DETAIL

I. MONTANA: THE TOURISM PRODUCT

Introduction

Before we begin our examination of the tourism market for Montana, we will survey the tourism product itself -- the attractions and tourism industry infrastructure in Montana that make it a vacation destination. We will take a brief look at the:

...National parks;

...Historical attractions;

...Ski facilities;

...Ranches;

..."Great outdoors" in Montana; and

...Lodging in the state.

The purpose of this section is not to provide an in-depth analysis of the attractions in Montana. Indeed, that is not possible due to the lack of available information. Compiling comprehensive information on facilities in the state is a large task that has not been done yet. It might be underscored that developing such an inventory should be a high priority item for Montana's tourism program.

The information provided here should be considered indicative, rather than descriptive of the offerings actually available in Montana. Therefore, our purpose is to outline only what is known about Montana as a tourism product.

A. National Parks

There are two major national parks in Montana -- Glacier and Yellowstone. However, only a small part of the latter is in Montana and it is generally not perceived to be a Montana destination.

Glacier, the best known attraction in Montana, features magnificent scenery, especially that which can be seen from Going To The Sun Highway. Access to the park is provided by some interstate highways (Routes 90 and 2 east-west, Routes 15, 83, 89, and 93 from the south), by air (through Kalispell) and Amtrak (Columbia Falls). While accommodations and other tourism elements are present in the area, the extent of development is not great.

While relatively little of Yellowstone is in Montana, a fairly developed tourism infrastructure is found near the park, particularly around West Yellowstone. However, access by train to the southern part of the state has been cut, and the local (West Yellowstone) airport is only a small, seasonal facility.

Therefore, road transportation is the only major mode available, and road access is not convenient from the perspective of developing a major tourism industry. Finally, to most tourists and representatives of the travel trade the major entry into Yellowstone is Jackson or Cody, Wyoming.

There is not at present any comprehensive, widely-distributed listing of attractions available in Montana in either park. The tourism industry related to both of these major attractions is relatively independent and unorganized for development.

In essence, while Glacier and Yellowstone are the dominant tourist attractions in Montana, they are not being exploited well. Many people who visit these parks are unaware -- even deny -- that they were in Montana. And, a sound, well-packaged tourism infrastructure designed to take advantage of the appeal of these two parks has not yet been developed.

Many of the state's tourism attractions are located (conveniently) between the two parks, including several national forests and similar areas. Since Montana is such a large state and so distant from large population centers, this concentration of potential attractions within a comparatively small area makes visitation of several Montana attractions more attractive than it would be otherwise.

B. Historical Sites

There are numerous historical sites in Montana, most of them related to the development of the Old West. There are attractions related to the Lewis and Clark expedition and Indian life, as well as restored ghost towns, and numerous battlefields and forts, including the Custer battlefield. Once again, many of the most popular sites are in the region between Glacier and Yellowstone national parks, providing the opportunity to promote them as part of a between-park tour.

However, promotion of these sites is currently fragmentary and very small. The level of development of most of the attractions is also low. Still, there is potential for promoting Montana as an area known for Old West history through development and packaging of several of the historical sites present.

C. Ski Facilities

Understandably, almost all of the 18 ski operations listed by the Montana Travel Promotion Unit are located in the mountainous western third of the state. However, only one-third of them are major, full-week operations. The remainder operate on shorter schedules and offer relatively small vertical rise slopes.

Some of the largest facilities could be competitive with the better-known ski areas in the Rockies region. Montana skiing features uncrowded slopes, short lift lines, and moderate prices in contrast to the overcrowding and high prices found in some other areas. However, promotion is small and unorganized compared with the efforts of the ski industry in states such as Colorado and Utah. Many active skiers are simply unaware of what skiing Montana has to offer. A unified, strong effort is critical if Montana is to compete in the non-resident ski market with already-established, organized competitors.

D. Ranches

Montana contains several working, resort, and dude ranches. The Dude Ranch Association lists 17 members in Montana, most of them in the Yellowstone vacation region, and the remainder in the vicinity of Glacier. These ranches provide a variety of vacation experiences in the Western outdoors, ranging from relaxed to rugged. Several of the ranches specialize in particular vacation segments, and build up a substantial return-visitor market.

Still, the ranches are not widely-promoted as a group. Offering convenient transportation and a unique vacation experience, these Montana ranches could be more actively promoted to a wider market. Of course, they clearly do not represent a mass-market opportunity.

E. The Great Outdoors

Clearly no listing of tourist attractions in Montana would be complete without including the "great outdoors" or the concept of "The Big Sky Country." Beautiful views, wide open spaces, rivers and streams, fishing and hunting, spectacular mountains, wilderness, and vast fields are the dominant feature of Montana's landscape. And these are clearly attractive features to many potential tourists.

From the tourism marketing perspective the problem is not the availability of natural attractions. They are available. Rather the problem is twofold:

> ...There is a lack of organization. Tourists do not visit natural attractions in great numbers just because they exist. Tourists will not travel miles just to see wide open spaces. Tourists need specific destinations. They need to be told "go here," "stand there," "see that view." The appeal of Yellowstone and Glacier is not just their natural features. The appeal of these parks is derived, in great part, from the fact that they are specific destinations with named places to go and see and a recognized tourism infrastructure. Thus, these parks can be promoted and a visit to them can be planned easily and conveniently.

...Most non-residents do not view the natural attractions of Montana as being unique. The prevailing view is that you do not have to visit Montana to see or experience nature -- even great nature. Other nearby states and Canada -- in many instances the tourist home area -- are seen as offering as spectacular scenery as does Montana. Thus, viewing scenery is not a unique appeal that leads people to visit Montana.

F. Lodging

As with many of the attractions in Montana, the lodging facilities are -- not surprisingly -- concentrated in the western half of the state. The incomplete data available indicates that:

...There are somewhat more than 10,000 rooms available in the state (based on the Montana Inn Keepers Association 1979-81 list of members and non-members);

...About half of that capacity is located in the Yellowstone vacation region (according to the Inn Keepers list and the AAA 1980 Tourbook listing of approved and not approved establishments); roughly one-quarter of the rooms are in the other major tourism district -- the Glacier park area -- and the remaining quarter is distributed around the rest of the state.

...While a large majority of establishments are quite small (70% have under 50 rooms according to AAA), much of the room capacity is concentrated in the few largest facilities (41% of all rooms in establishments with 100 or more rooms).

...Most of the rooms are located in motels (38%) or motor inns (41%), but comparatively few are in hotels (7%) or resort facilities (13% according to AAA listing).

...Most of the rooms are full, standard rooms (86%) rather than economy (14% according to the Inn Keepers list). Deluxe accommodations appear scarce.

In sum, it appears that consequential lodging capacity exists in the areas where tourism development is strongest. Also, much of the capacity is located in large facilities that are better able to offer competitive amenities for tourists. However, strong promotion and organization of the industry does not exist at present. Given the large incidence of relatively small establishments that lack dollars for self-promotion, the need for joint efforts appears clear.

Relative to lodging, one other fact is clear. Montana lacks the type of exotic, flashy, exciting, night-life oriented facilities that characterize most major vacation destinations. Many tourists are attracted by the atmosphere suggested by Las Vegas, Broadway, Hawaii, Acapulco, etc. Even if they do not gamble or participate in other "jet-set" activities there, tourists want to be where such an opportunity exists. We are not recommending building such facilities; however, we must recognize the limitation imposed by their absence. Montana cannot expect to compete with areas offering these appeals to those tourists who feel such an atmosphere is a key attribute of a vacation spot.

NUMBER OF ROOMS PER REGION BY TYPE OF ROOM AND ESTABLISHMENT

	Total Rooms	% Of Rooms	TOURISM REGION Yellow-stone	Glacier	Charlie Russell	Custer	Missouri River
Total	10,031		5,306	1,993	1,872	480	380
(% Of Total)		(100%)	(53%)	(20%)	(19%)	(5%)	(4%)
Standard rooms	8,622	(86%)	4,657	1,687	1,567	383	328
Economy rooms	1,409	(14%)	649	306	305	97	52

SOURCE: Montana Inn Keepers Association 1979-81 List of Members and Non-Members

	Total Rooms	% Of Rooms	TOURISM REGION Yellow-stone	Glacier	Charlie Russell	Custer	Missouri River
Total	8,106		3,984	2,132	1,149	366	475
(% Of Total)		(100%)	(49%)	(26%)	(14%)	(5%)	(6%)
Motel	3,084	(38%)	1,190	766	456	366	306
Motor Inn	3,313	(41%)	1,773	678	693	-	169
Hotel	540	(7%)	540	-	-	-	-
Resort	1,084	(13%)	407	677	-	-	-
Other	85	(1%)	74	11	-	-	-

NOTE: Shows number of rooms calculated from AAA TourBook; establishment categories based on AAA definitions; all resort-type establishments included in resort category; includes both approved and not approved establishments listed.

SOURCE: Automobile Association of America TourBook 1980 -- Idaho/Montana/Wyoming

NUMBER OF LODGING ESTABLISHMENTS BY SIZE PER REGION

				MONTANA TOURISM REGION				
	Total	% Of Establishments	% Of Room Capacity	Yellowstone	Glacier	Charlie Russell	Custer	Missouri River
Total	175	100%	100%	87	49	18	9	12
(% Of Total)				(50%)	(28%)	(10%)	(5%)	(7%)
Under 25 rooms	79	45%	16%	43	20	8	4	4
25 - 49 rooms	44	25%	21%	21	16	2	1	4
50 - 74 rooms	26	15%	16%	9	7	3	4	3
75 - 99 rooms	5	3%	6%	2	1	1	-	1
100 and more rooms	21	12%	41%	12	5	4	-	-

NOTE: Shows number of lodging establishments listed in AAA TourBook (approved and not approved establishments included), based on the number of rooms in the establishment.

SOURCE: Automobile Association of America TourBook 1980 -- Idaha/Montana/Wyoming

Interim Summary

Montana has many attractions and features that could appeal to tourists. There are places to stay; there are places to eat; there are things to do; there are opportunities for seeing both man-made and natural attractions. On this basis there is indeed the potential for a greatly increased tourism business.

If the product problem is not a lack of attractions, what is it? We feel strongly that all the data from the surveys of prime market tourists and travel trade representatives show that there is a lack of:

...Organization of the tourism businesses;

...Infrastructure; and

...Conceptual packaging.

As we shall see, tourists and the tourist trade are unaware of where to go in Montana, how to plan trips to specific places in Montana, and just where to go to see and do. It is this organizational need that must be a high priority.

II. AWARENESS OF MONTANA AS A VACATION DESTINATION

Introduction

For a tourist to decide to actually vacation in a state, he needs to think of it when he thinks of places to go for a vacation. Establishing a substantial level of awareness is one of the first steps in building a location as a vacation destination in the public's mind. In fact, unlike some other product categories, relative awareness is a good predictor of the vacation saliency and hence actual visitation in the tourism marketplace.

However, a tourist does not visit a state, he visits particular places in the state. Therefore, he needs to be aware of specific places to visit in the state. If the tourist is aware of the destination in general as well as specific places to go in the destination area, then it can be included in his selection of a vacation destination.

Therefore, in this chapter we will look at:

...Awareness of Montana as a vacation destination among:

- U.S. prime market tourists;
- Canadian prime market tourists, including awareness of advertising for Montana as a vacation destination among these groups; and
- Travel trade representatives in domestic and foreign markets.

...Familiarity with specific places in Montana for vactioning among:

- U.S. prime market tourists;
- Canadian prime market tourists; and the
- Travel trade.

In order to be clear, it should be recognized that in the following pages reference is made to "awareness of Montana." This does not refer to whether or not tourists have ever heard of the state of Montana. Rather, it means consciousness of the state as a vacation destination. Those who are <u>not</u> "aware of Montana" as a vacation destination are those who do <u>not</u> think of Montana as a place that they would visit on a pleasure trip.

A. Awareness Of Montana

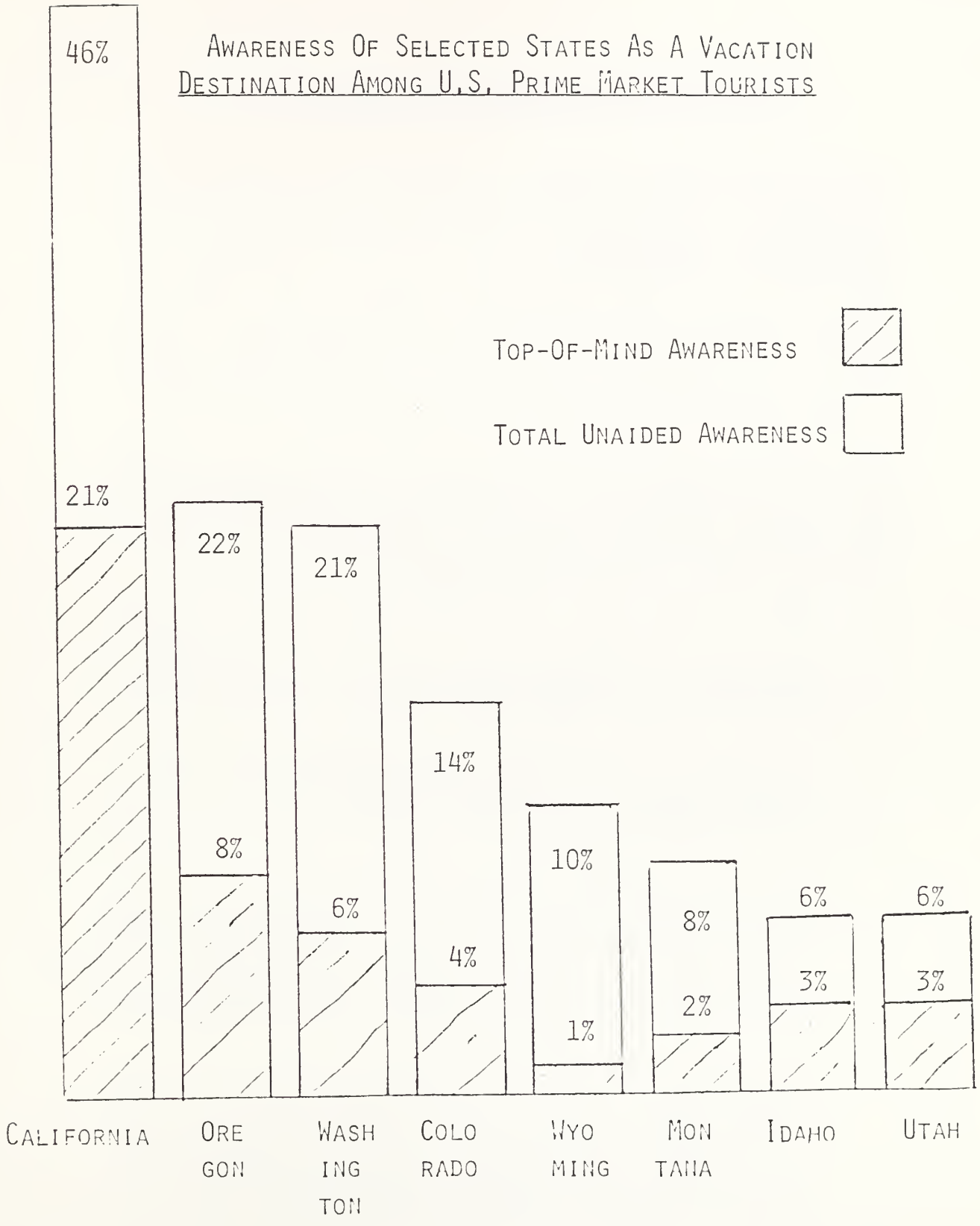
1. Awareness Among U.S. Prime Market Tourists

Among those in the U.S. prime market, awareness of Montana as a vacation destination currently is very low.

...Very few (2%) mention Montana as the vacation destination in the U.S. or Canada that first comes to mind. This proportion is similar to those for Utah and Idaho (3%), Wyoming (1%), and Colorado (4%), but less than that for Washington (6%) and Oregon (8%), and much less than for California (21%).

...Similarly, few (8%) name Montana as a vacation destination when asked to list all the vacation destinations that come to mind. While some other states have comparable scores for total unaided awareness -- such as Utah (6%), Idaho (6%), and Wyoming (10%) -- other states have substantially higher awareness scores -- Colorado (14%), Washington (21%), and Oregon (22%). Again, California dominates in awareness in this market -- almost half (46%) name it as a vacation destination that comes to mind.

Awareness Of Selected States As A Vacation Destination Among U.S. Prime Market Tourists



NOTE: Shows proportion of past-year travelers residing in prime market states who think of each state first when they think of vacationing in U.S. or Canada (top-of-mind) or think of state at all (total unaided awareness); BASE = 505.

2. Awareness Among Canadian Prime Market Tourists

Awareness of Montana as a vacation destination is similarly low in the Canadian prime market. Very few (1%) think of Montana first when they think of places to go for a vacation. Only a small proportion -- equal to that in the U.S. prime market (8%) -- think of Montana at all when asked to think of a vacation destination.

British Columbia dominates in awareness and is probably the strongest competition among nearby vacation destinations. Its ranking is comparable to that of California among the U.S. prime market.

...Awareness of British Columbia is very high (25% top-of-mind, 43% total unaided awareness).

...In fact, it is much higher than awareness of the prime market tourists' home province, Alberta (3% top-of-mind, 7% total unaided awareness).

...Awareness of Montana is about the same among Canadian prime market tourists as it is among U.S. prime market tourists. However, awareness of three of the major U.S. prime market destinations -- Oregon, Washington, and California -- is lower among tourists residing in Alberta (Canadian prime market) than it is among tourists in the U.S. prime market.

...Evidence for the warm-weather market is seen in the awareness of destinations such as Las Vegas and Hawaii. Awareness of these destinations is at least as high in Canada as in the U.S. prime market. It must be remembered that in both markets, an important segment of tourists are not oriented towards Montana-type destinations.

AWARENESS OF SELECTED VACATION DESTINATIONS
AMONG U.S. AND CANADIAN TOURISTS

	Top-Of-Mind Destination Awareness		Total Unaided Destination Awareness	
	U.S.	Canada	U.S.	Canada
	%	%	%	%
Montana	2	1	8	8
Alberta	1	3	4	7
British Columbia	2	25 ←	9	43 ←
Oregon	8	1	22	4
Washington	6	3	21	15
California	21	16	46	41
Hawaii	7	9	21	21
Las Vegas	*	3	3	9
BASE	505	100	505	100

* Less than 0.5%

3. Advertising Awareness Among Prime Market Tourists

Unaided awareness of advertising for Montana as a vacation destination is low among both groups of prime market tourists, but is higher among Canadian tourists than among U.S. prime market tourists.

...Only a few (2%) U.S. tourists mention Montana when asked for which destinations they have recently seen or heard advertising. Somewhat more (7%) of the Canadian prime market tourists say they recall advertising for Montana.

...In contrast, unaided advertising for warm-weather destinations is much higher in both markets: Las Vegas (6% U.S., 19% Canadian), California (12% U.S., 24% Canadian) and Hawaii (23% U.S., 28% Canadian).

Recall that even though advertising awareness is somewhat higher among Canadian tourists, this does not translate into higher awareness of Montana as a vacation destination.

ADVERTISING AWARENESS OF SELECTED VACATION DESTINATIONS
AMONG U.S. AND CANADIAN TOURISTS

	Unaided Advertising Awareness	
	U.S.	Canada
	%	%
Montana	2	7
Alberta	2	6
British Columbia	9	16
Oregon	4	4
Washington	5	6
California	12	24
Hawaii	23	28
Las Vegas	6	19
BASE	505	100

4. Awareness Of Montana As A Vacation Destination Among The Travel Trade

Awareness of Montana as a vacation destination is low among the travel trade, and especially among foreign representatives.

...A large proportion of tour operators are oriented towards the sun/sand/sea vacation market and therefore are not interested in the type of market toward which Montana is directed. They simply do not deal with such places in their operation.

...Others are involved with destinations such as Montana, but in comparison with competitiors such as Colorado, for example, they are relatively unaware of Montana as a vacation destination. When they think of places to send their clients, Montana is just not now among the places they consider.

...Foreign tour operators are aware of and excited by the development of the Old West as a vacation region. This trend is aided by the bargain that the United States presents as a vacation destination for those with foreign currencies. It is also encouraged by the interest among foreign tourists in the American Old West. This is particularly true in Germany and the United Kingdom. However, the Old West market is just emerging and awareness of specific locations, such as those in Montana, is currently low.

The "southern" west as represented by Arizona, New Mexico, or Texas appears to be better known than is its "northern" counterpart.

B. Familiarity With Specific Montana Attractions

In order to convert general awareness into actual visitation, tourists must have familiarity with specific locations in a state. They do not simply visit Montana -- rather, they visit specific places in Montana. Tourists must be able to think of specific places to go and attractions to visit. Those in the travel trade also must be familiar with places to send their clients and how to arrange for their visits.

1. Familiarity Among Prime Market Tourists

In general, U.S. and Canadian tourists are unfamiliar with specific tourist-oriented places in Montana.

...When asked where in Montana they would go if they took a vacation trip to Montana, the response given by the largest proportion of U.S. tourists is "I don't know" (29%). Interestingly, the proportion is even higher among Canadian prime market tourists (38%).

...While large proportions do mention some city in Montana (59% U.S., 43% Canada), many of the locations are not tourist-oriented. It is probably that most tourists simply named those cities that they knew were in Montana, but would not actually visit them on a vacation trip.

Even if these cities would be included on a vacation itinerary, they do not represent primary destinations.

...Among U.S. tourists, Glacier National Park is the only tourist location mentioned by more than a few (22%). However, it is not nearly so popular among Canadian prime market tourists -- fewer than one in ten (7%) say they would visit the park on a Montana vacation trip, even though it is one of the Montana attractions closest to Alberta.

...The location is most commonly mentioned by Canadian tourists is Great Falls (20%). Surprisingly, other northern locations such as Kalispell (4%), or Missoula (3%) are not often mentioned.

EXPECTED DESTINATION OF IMAGINED MONTANA PLEASURE TRIP

Where Tourist Would Go If Went To Montana	U.S. %	CANADA %
Don't know	29	38
Named Any Locations (Net)	68	52
Named Montana Destinations (Net)	59	43
Glacier National Park	22	7
Yellowstone National Park	9	3
Missoula	8	3
Billings	8	1
Butte	7	7
Great Falls	5	20
Helena	5	7
Kalispell	4	4
Bozeman	3	1
Big Sky	2	1
West Yellowstone	2	-
Red Lodge	1	-
Fort Peck Lake	1	-
Miles City	1	-
Big Mountain	*	-
Custer National Forest	*	-
Named incorrect destination(s)	3	-
Other	11	16
Wouldn't go/no answer	4	10
BASE	505	100

* Less than 0.5%

As a result of their lack of familiarity with specific tourist locations, few tourists feel Montana has much to offer them as a vacation destination. On the other hand, they generally do not feel that is has nothing to offer.

...Roughly one in three feels that Montana is not at all described as a place they feel familiar with (36% U.S., 29% Canada). About half this proportion say that Montana is completely described as a place they feel familiar with (16% U.S., 18% Canada).

...Not surprisingly then only a small proportion feels that Montana completely fits the description of a place that has lots of different things to do (16% U.S., 17% Canada).

...However, half say that Montana is not at all described as a place that has nothing to do (50% U.S., 49% Canada).

In sum, Montana does not have a negative image as a place that has nothing to offer the tourists. There are -- undoubtedly -- things to do in Montana. The problem, or void, is that prospective tourists are not able to list specific things to do nor do they know where -- in Montana -- to go to do those things. There is a clear need for Montana to improve its image through promotion of specific attractions in the state which would give tourists clear, specific reasons to come and clear, specific places to visit.

DESCRIPTION OF MONTANA AS A VACATION DESTINATION

	Describes Completely		Not At All	
	U.S.	Canada	U.S.	Canada
	%	%	%	%
Montana is a place that:				
I feel familiar with	16	18	36	29
Has lots of different things to do	16	17	11	14
Offers nothing to do	7	4	50	49
BASE	505	100	505	100

NOTE: Shows proportion of U.S. prime market tourists who answered "5" or "1" on a "1" to "5" scale where "5" means "describe completely" and "1" means "does not describe at all".

This failure to consider Montana as a place to go for a vacation correlates with the character of tourist travel. For approximately 4 in every 5 tourists in Montana, Montana is not their primary vacation destination. Rather they are going somewhere else or returning from somewhere else. They are not in Montana because they thought of Montana as a vacation destination in and of itself.

2. Familiarity Among The Travel Trade

Likewise, familiarity with specific tourist locations in Montana is low in the travel trade. Tour operators do not know of tourist attractions other than Glacier and Yellowstone National Parks, generally, and Yellowstone is not usually considered a Montana destination. It is more often viewed as a Wyoming destination.

In particular, the travel trade is unfamiliar with air gateways or road routes to Montana locations. Even in Glacier, few operators are aware of the accommodations or other attractions available in the area.

In comparison with their familiarity with other similar locations, members of the tavel trade know little about Montana. The state is often viewed as simply a place to get through in order to get somewhere else. Glacier is attractive to some of them, but the distance to reach it and the lack of known facilities in the area dampen their enthusiasm. Still, certain operators both domestic and foreign are interested in learning more about Montana, particularly about a Glacier-Yellowstone package offering.

Interim Summary

Among all segments of the travel marketplace studied -- U.S. primary market tourists, Canadian prime market tourists, U.S. based travel trade operations and European travel trade operators -- the key finding is an almost total lack of positioning of Montana as a place to vacation. When people think "vacation" they just do not think "Montana." And not thinking of Montana, they do not consider nor plan to visit this state.

Further, when one suggests Montana as a place to vacation most tourists and travel trade members have no clear image of where in Montana to go. Except for the National Parks there is no real conception in the minds of most people of any vacation destination to which they might travel in Montana.

Clearly increasing awareness must be a key goal of the marketing plan -- awareness of the state of Montana and awareness of specific destination in Montana.

III. HOW MONTANA IS VIEWED AS A VACATION DESTINATION

Introduction

So far, we have learned that Montana is not often thought of when tourists or the travel trade think of vacation destinations. Also, they are not familiar with specific tourists locations in the state. Now we are going to concentrate on their view of what they think they do know about Montana. Specifically, we will view their opinion of:

...The positive image of a vacation in Montana;

...What drawbacks there are to Montana vacations; and finally

...The lack of perceived uniqueness of Montana.

It will become clear in the next few pages that Montana is viewed differently by Canadian tourists compared with those in the U.S. prime market. In our discussion of each aspect of Montana's image, we will compare the two groups as well as analyze each on its own.

Now we will start by considering what tourists and the trade see as advantages of Montana as a vacation destination.

A. Advantages Of Montana

Here we will look at the positive aspects of Montana held by:

...U.S. prime market tourists;

...Canadian prime market tourists; and the

...Travel trade.

1. Advantages Seen In The U.S. Prime Market

Overall, U.S. prime market tourists see Montana as a big, beautiful state with opportunities for nature-oriented activities. At least half of the U.S. tourists in the prime market believe that Montana is described completely as:

...Having lots of wide, open space (79%);

...A good place to get away from crowds (58%);

...A good place to see wildlife (55%); and

...Good for rest and relaxation (48%).

There is demand for a vacation destination with these qualities. Equally large proportions say that these qualities are essential or important on a vacation trip. A majority report it is essential or important to:

...Get out into the wide, open country (61%);

...Get away from all the crowds (69%);

...Get "into" nature (57%); and

...Get lots of rest and relaxation (70%).

ASPECTS OF MONTANA WIDELY PERCEIVED BY U.S. TOURISTS

	Completely Describes Montana	Essential/ Important On Vacation Trip
	%	%
Has lots of wide, open space	79	
Getting out into the wide, open country		61
Good place to get away from crowds	58	
Getting away from all the crowds		69
Good place to see wildlife	55	
Getting "into" nature		57
Good for rest and relaxation	48	
Getting lots of rest and relaxation		70
BASE	505	505

NOTE: Shows proportion of U.S. prime market tourists who answered "5" on a "1" to "5" scale measuring how well they thought each phrase describes Montana ("5" means "describes completely"); also shows proportion who claim aspect of vacation is "essential" or "important" to them.

It is not surprising, then, that most U.S. tourists say they would participate in nature-oriented activities if they went to Montana on a vacation trip.

...Slightly more than half (54%) think of such activities when they think of what they would do in Montana. Large proportions mention camping (23%), fishing (19%), and hiking (15%).

...In addition, one-third (36%) mention sightseeing as something they would do if they went to Montana. Note that these activities can be done easily at many destinations other than Montana.

...In contrast, only small proportions associate any other activities with Montana. Specifically, few mention:

- Visiting parks, such as Glacier, the single best-known attraction in the state (8%);
- Water activities (7%);
- Visiting museums or historical sites (5%);
- Winter activities like skiing (4%); or
- Attending rodeos (3%).

This clearly suggest an information gap. All of these are available.

ACTIVITIES ASSOCIATED WITH MONTANA

What Prime Market Tourist Would Do On Montana Vacation	U.S. Prime Market %
Nature-Oriented Activities (Net)	54
Camping/backpacking	23
Fishing	19
Hiking	15
Horseback riding	8
Hunting	5
Dude ranch	3
Sightseeing	36
Visit friends and relatives	11
Rest and relaxation	9
Visit parks	8
Water activities	7
Visiting museums/historical sites	5
Winter activities	4
Attend rodeos	3
All other activities	2
Don't know/nothing	4
BASE	505

In sum, U.S. prime market tourists see Montana as a beautiful area for nature-oriented activities. It is not currently viewed by many as a place to do things other than camp, hike, or fish. These activities are attractive to many tourists, but they attract a specific segment of the market. Montana is not viewed as the place for everyone.

The prevailing image of Montana as a place to engage in activity rather than as a number of specific destinations to visit is consistent with the finding that Montana visitors are more apt to be blue-collar than are prime market tourists in general.* White-collar tourists are more apt to take destination-oriented vacations -- those involving staying at resorts, for example -- than are blue-collar tourists. The latter are more likely to take activity-oriented vacation, such as a two-week fishing trip.

*See Volume III Chapter 4

2. Montana's Image In The Canadian Prime Market

While U.S. tourists see Montana as a place for nature-oriented activities, Canadians are more apt to think of its developed aspects -- skiing and shopping.

...Compared with U.S. tourists, Canadian prime market tourists are far less likely to mention nature-oriented activities (24% vs. 54%) and somewhat less apt to say sightseeing (28% vs. 36%) when thinking of what they would do in Montana.

...However, Canadian prime market tourists are more likely to see winter sports such as skiing as an advantage of a Montana vacation (19% vs. 4%).

...In addition, a proportion of Canadians say they would go to Montana to shop (16%), while almost no U.S. tourists mention shopping.

ACTIVITIES ASSOCIATED WITH MONTANA

What Prime Market Tourist Would Do On Montana Vacation	U.S. %	Canada %
Nature-Oriented Activities (Net)	54	24
Camping/backpacking	23	12
Fishing	19	12
Hiking	15	5
Horseback riding	8	2
Hunting	5	-
Dude ranch	3	-
Sightseeing	36	28
Rest and relaxation	9	15
Visit parks	8	2
Water activities	7	9
Visiting museums/historical sites	5	5
Winter activities	4	19
Attend rodeos	3	-
Visit friends and relatives	11	4
Shop	**	16
All other activities	2	16
Don't know/nothing	4	10
BASE	505	100

** Very few responses among U.S. tourists, therefore not tabulated; can be assumed to be very small proportion.

The reason for this difference in views of Montana is due to Canadians being less apt to characterize Montana as a "nature" destination, even though "nature" aspects of a vacation are as important to them as they are to U.S. tourists.

...Canadian prime market tourists are less likely to say Montana is completely described as:

- Having lots of wide, open space (57% vs. 79%);
- A good place to get away from crowds (23% vs. 58%);
- A good place to see wild life (23% vs. 55%); or
- Good for rest and relaxation (32% vs. 48%).

...Still, similar proportions feel that it is essential or important on a vacation trip to:

- Get out into the wide, open country (69% vs. 61%);
- Get away from all the crowds (71% vs. 69%);
- Get "into" nature (57% vs. 57%); or to
- Get lots of rest and relaxation (64% vs. 70%).

COMPARISON OF PERCEPTIONS OF MONTANA AMONG
U.S. AND CANADIAN PRIME MARKET TOURISTS

	Completely Describes Montana		Essential/ Important On Vacation Trip	
	U.S.	Canada	U.S.	Canada
	%	%	%	%
Has lots of wide, open space	79	57		
Getting out into the wide, open country			61	69
Good place to get away from crowds	58	23		
Getting away from all the crowds			69	71
Good place to see wildlife	55	23		
Getting "into" nature			57	57
Good for rest and relaxation	48	32		
Getting lots of rest and relaxation			70	64
BASE	505	100	505	100

NOTE: Shows proportion of prime market tourists who answered "5" on a "1" to "5" scale measuring how well they thought each phrase describes Montana ("5" means "describes completely"); also shows proportion who claim aspect of vacation is "essential" or "important" to them.

Canadian prime market tourists are less likely to see Montana as an Old West, cowboy-type destination, and are also less apt to think of Montana as a place for nature-oriented vacations.

...Compared with U.S. tourists, Canadians are less likely to think Montana is completely described as having a cowboy and frontier flavor (30% vs. 44%) or as the place to see Old West history (15% vs. 38%).

...They are also less prone to say that Montana completely fits the description as a place:

- That is cleaner than other states (7% vs. 22%);
- To see wildlife (23% vs. 55%); or
- To get away from crowds (23% vs. 58%).

For the Canadian prime market tourist, we have seen that Montana is more apt to be seen as a place for skiing and shopping than it is for U.S. tourists even though the Canadian dollar currently is worth less than the U.S. dollar. Canadian tourists are divided as to what other things they see as good about Montana.

COMPARISON OF MONTANA'S IMAGE AMONG U.S. AND CANADIAN TOURISTS

Prime Market Tourists Say Montana Is Described Completely As:	U.S. %	Canada %
Having a cowboy and frontier flavor	44	30
The place to see Old West History	38	15
Cleaner than other states	22	7
The place to see wildlife	55	23
The place to get away from crowds	58	23
BASE	505	100

NOTE: Shows proportion of prime market tourists who answered "5" on a "1" to "5" scale measuring how well they thought each phrase describes Montana ("5" means "describes completely").

Overall, Canadian prime market tourists from Calgary are much more likely than are those from Edmonton -- and in many respects, those from the U.S. -- to have a positive view of Montana.

...Understandably, a much higher proportion of Calgary tourists than of Edmonton or U.S. prime market tourists say that Montana is easy to get to (64% vs. 26% and 24%).

...But Calgary tourists also stand out as being more likely than are Edmonton or U.S. tourists to describe Montana as a great place for skiing (32% vs. 16% and 20%) or as having really friendly people (50% vs. 28% and 27%).

...Also, Calgary tourists are more likely than are Edmonton tourists to summarize their feelings by saying that Montana is completely described as a place with which they are familiar (26% vs. 10%) or want to visit (36% vs. 16%). These proportions from either Canadian city are not dramatically different from the proportions in the U.S. prime market. Still, Calgary appears to be a market that is especially positive about Montana.

...On the other hand, Edmonton tourists are less likely than are tourists from Calgary or the U.S. to describe Montana using a number of other positive phrases.

Overall, Edmonton tourists are likely less likely than either Calgary or U.S. prime market tourists to have a positive view of Montana as a vacation destination.

COMPARISON OF MONTANA'S IMAGE AMONG U.S., CALGARY, AND EDMONTON TOURISTS

Montana Is Described Completely As:	U.S.	Canada	
		Calgary	Edmonton
	%	%	%
Easy to get to	24	64	26
A great place for skiing	20	32	16
Having really friendly people	27	50	28
A place I feel familiar with	16	26	10
A place I want to visit	24	36	16
Having a cowboy and frontier flavor	44	38	22
A good place for a family vacation with the children	38	42	24
A good place for rest and relaxation	48	40	24
Having lots of wide, open space	79	72	42
Inexpensive to stay there	10	14	2
A place that is different and unique	24	18	6
BASE	505	50	50

NOTE: Shows proportion of prime market tourists who answered "5" on a "1" to "5" scale measuring how well they thought each phrase describes Montana ("5" means "describes completely").

3. Image Among The Travel Trade

The travel trade's image of Montana resembles that prevailing in the U.S. prime market -- Montana is a great place for people who like to go camping, hiking, and fishing, but there is not much else to do there. The travel trade is not familiar with specific opportunities available -- where to go, what to do in those places. This type of destination is seen as attractive to a sizable, but special segment of their clients. In addition, Montana is not seen as having a particular distinction to separate it from other states in which such activities are available.

Still, there does not seem to be any negative element present in Montana's image among the trade. Rather, Montana lacks positive elements which help sell it in the market. Travel personnel feel that Montana should emphasize those unique aspects of what it offers in order to build up a loyal portion of the market.

Among foreign travel personnel Montana and states like it are viewed very positively. The trade reports that tourists in foreign markets are seeking Old West, frontier-type destinations in increasing

numbers. The favorable rates of exchange with the dollar also help strongly to increase the attractiveness of all U.S. vacation destinations. With relatively cheap vacation costs, travel to or through Montana -- the state's perennial disadvantages for tourists from large but distant population centers -- becomes less of an obstacle in attracting foreign sources of tourism. Dude ranches appear to have a limited, but quite strong, attraction for groups of foreign tourists.

B. Disadvantages Of Montana As A Vacation Destination

Not suprisingly, U.S. tourists mention a lack of things to do, cold weather and transportation difficulties as drawbacks to vacationing in Montana. Seasonality and distance from population centers are negative characteristics which clearly shape Montana tourism.

...Corresponding to the general lack of familiarity with Montana that was already noted, one-fifth of the U.S. tourists (21%) feel there is nothing to do in Montana. A similar proportion (14%) say they do not know enough to mention a disadvantage of Montana.

...One tourist in five (21%) makes some negative comment about the weather -- specifically, that it is too cold (15%). Relatedly, most of the U.S. prime market tourists who say they intend to take a vacation trip to Montana in the next few years plan to go in the summer (66%).

...In addition, a proportion claims that Montana is too far/time-consuming/costly/difficult to get to (16%).

Importantly, Canadian prime market tourists are less likely to find disadvantages in a Montana vacation (24% vs. 55%). They are less apt to say that there is nothing in Montana (9% vs. 21%) or that Montana is too cold (1% vs. 15%). Transportation is a drawback for about the same proportion, however (10% vs. 16%), and a large proportion say they don't know enough about Montana to mention a drawback (26%).

DISADVANTAGES OF MONTANA AS A VACATION DESTINATION SEEN BY U.S. TOURISTS

	U.S.	Canada
	%	%
Mentioned Negative Aspects (Net)	55	24
Lack Of Attractions (Net)	21	9
Boring/nothing there	12	7
Barren/desolate	6	-
Flat/no trees/mountains	5	1
Unpopulated	1	1
Weather (Net)	21	2
Too cold	15	1
Too hot in summer	5	-
Bad weather	4	1
Transportation problems	16	10
Don't know much about Montana	14	26
No disadvantages	25	31
All other answers	7	15
BASE	505	100

Tour operators point out that the distance to and between Montana attractions could prohibit the development of them due to:

...The time required to get into Montana from a population center;

...The long hours required to move a group from one attraction to another within the state or to another attraction in a nearby state; and therefore

...The limited market for this type of vacation -- that is, those with a large amount of time for vacations, such as older people; and

...The expense of transportation overall.

However, the acknowledge that these drawbacks can be significantly reduced by:

...Promoting fly/bus tours which would reduce the time needed to get into the Old West Region; and

...Concentrating on tourist attractions in one region of the state, probably the corridor between the national parks, reducing the time between attractions; and thus

...Reducing the transportation costs of a tour package.

In sum, negative views are not a problem for Montana tourism development. It is not negative views but a lack of any view that is the critical problem.

C. View Of Montana As A Unique Destination

Despite the appreciation of Montana's attributes -- namely its natural beauty and opportunity for outdoor activities -- it is not generally seen as unique or distinguished from other nature-oriented states.

...U.S. prime market tourists widely agree that Montana has lots of wide, open space (79% describes completely) but far fewer similarly rate Montana as one of the most beautiful states around (19%), as cleaner than other states around (22%), or possessing the most spectacular scenery (16%).

...Even smaller proportions of Canadian tourists believe Montana completely fits these descriptions. For them, Montana is less likely to stand out as a nature-oriented state. In fact, we have seen that they are more oriented towards the developed aspects of the state.

...Therefore, only one-quarter of the U.S. tourists (24%) and half as many of the Canadian tourists (12%) feel that Montana completely fits the description of a different and unique destination.

VIEW OF MONTANA'S UNIQUENESS

Montana Is Described Completely As ...	U.S. %	CANADA %
Having lots of wide, open space	79	57
One of the most beautiful states	19	10
Cleaner than other states around	22	7
Having the most spectacular scenery	16	11
Different and unique	24 ⇐	12 ⇐
BASE	505	100

NOTE: Shows proportion of prime market tourists who answered "5" on a "1" to "5" scale measuring how well they thought each phrase describes Montana ("5" means "describes completely").

Montana's lack of perceived uniqueness among prime market tourists is demonstrated further by the lack of destination-specific advantages they see in going to Montana.

...Many (47% U.S., 34% Canada) mention seeing the beautiful scenery in Montana as an appeal to going there. In addition, some (19% U.S., 8% Canada) mention the wilderness activities offered in Montana. Yet neither of these advantages is available only in Montana.

...Only one U.S. tourist in ten (11%) mentions an attraction which is specific to Montana -- Glacier National Park.

Thus, while Montana is seen as a beautiful state, this does not necessarily motivate consumers to visit Montana rather than another similar area. Montana needs to establish its uniqueness by presenting the natural splendors of the state in a distinctive way.

LACK OF UNIQUENESS OF MONTANA AS A VACATION DESTINATION
SEEN BY PRIME MARKET TOURISTS

What About Montana Vacation Is Appealing	U.S. %	Canada %
Mention Positive Aspect (Net)	72	72
Sightseeing (Net)	47	34
Wilderness Activities (Net)	19	8
Skiing	5	24
Visit Parks (Net)	17	10
Glacier National Park	11 ←	5 ←
Yellowstone National Park	5	3
Other park references	4	6
Good Atmosphere (Net)	12	12
Friends/relatives there	10	8
Don't know much about Montana	8	5
Nothing appealing	14	11
All other	3	18
BASE	505	100

Interim Summary

Montana has a positive image overall among U.S. and Canadian prime market tourists as well as the travel trade. They view Montana as a big, beautiful state with many opportunities for nature-oriented activities like camping, hiking, and fishing. Canadian tourists are less likely than U.S. tourists to see Montana as a place to get "into" nature, perhaps due to their living in a similar area and having access to the northern provinces. While Canadian tourists are still apt to consider Montana as a "natural" destination, they are more likely than U.S. tourists to also think of going skiing and shopping -- activities requiring more developed resources.

With such positive image, why don't all tourists go to Montana? Of course, distance and temperature are drawbacks, but less so for tourists in nearby states or for those living in colder climates, such as Canada. However, there is no strong, unique attraction to draw tourists to Montana at present. Tourists are apt to say that Montana is a nice place, but there is nothing which compels them to make the trip to visit it. They and the travel trade feel that Montana is beautiful, but so are many other states in which camping

and sightseeing are readily available. In addition, it was already pointed out that Montana is not a destination with which the tourist market or the travel trade is familiar. There is nothing unique perceived about the state because nothing specific is known about it.

IV. INTEREST IN VISITING MONTANA

Introduction

We will now consider a summary measurement of tourists' views of Montana as a vacation destination -- interest in visiting the state. We will examine the reported likelihood of taking a vacation trip to Montana among U.S. and Canadian prime market tourists. In addition, we will compare interest in vacationing in Montana with that of other states to put interest in Montana in perspective.

Tourists were asked to rate the likelihood of their vacationing in several selected Western locations in the next several years. They reported this by using a five-point scale on which "1" means "not at all likely" and "5" means "very likely." Tourists for whom a Montana trip is considered "likely" are those rating their likelihood with a "4" or "5." Those for whom a trip to Montana is at least "possible" are those using a "3," "4," or "5."

Those noting their likelihood as at least "possible" were then asked whether or not they were at present actually planning to take a pleasure trip to Montana in the next year or two. Those responding affirmatively are considered those who "intend" to take a trip.

A. Interest Among U.S. Prime Market Tourists

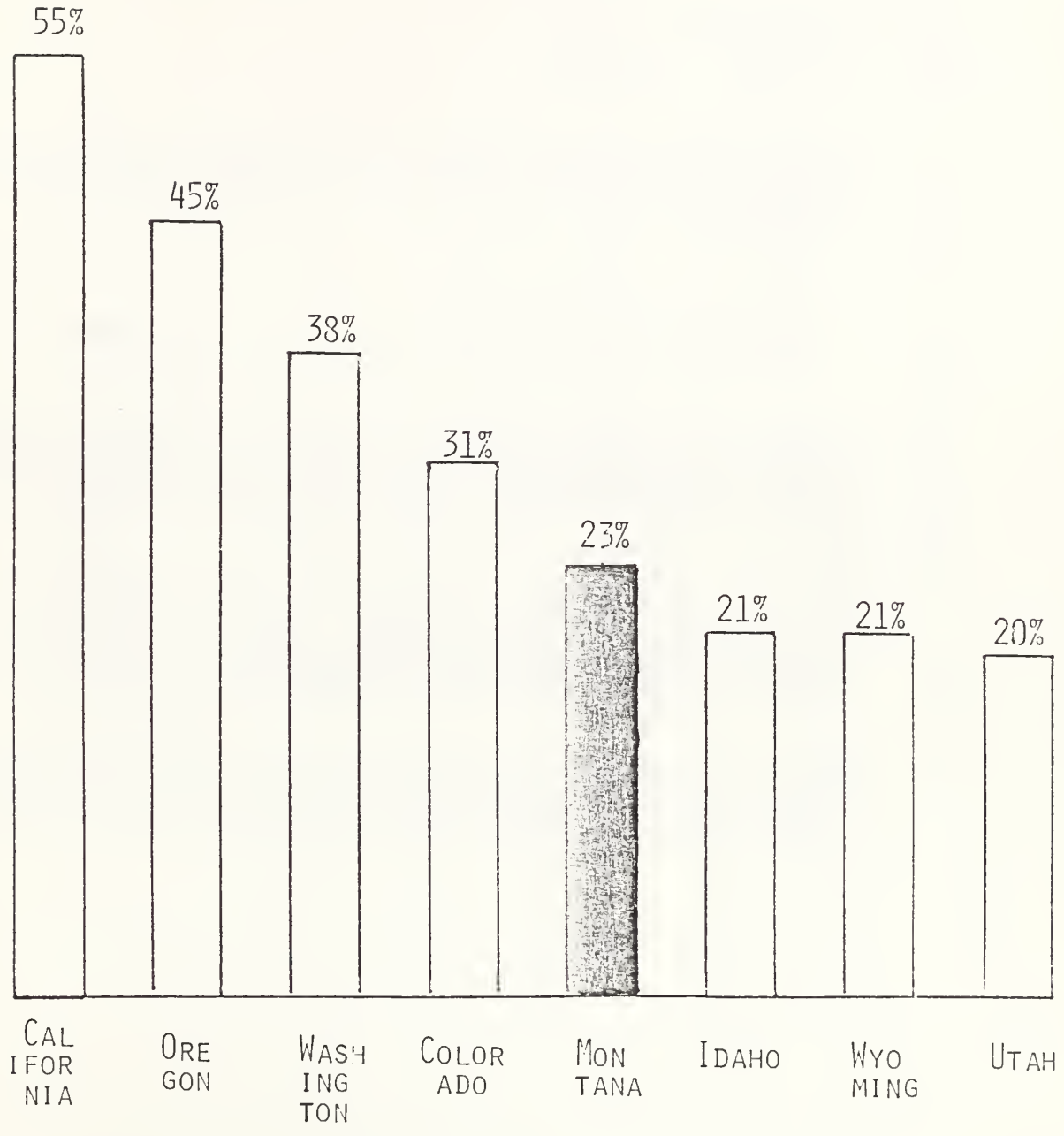
A substantial minority of U.S. prime market tourists say they are likely to visit Montana. However, the proportion is much lower than that of certain other competitive states.

...Almost one-quarter (23%) of the U.S. prime market tourists not living in Montana say they are likely to visit Montana on some type of a pleasure trip in the next several years. This compares with similar proportions of non-residents evaluating Utah (20%), Wyoming (21%), and Idaho (21%).

...However, it is substantially below the levels among state non-residents for Colorado (31%) and the Pacific states of Washington (38%), Oregon (45%), and California (55%). While it may be unrealistic for Montana to try to achieve the levels of the Pacific coast states, Colorado offers attractions similar to those in Montana and may provide a suitable goal.

Proportion Of U.S. Prime Market Tourists Likely To Vacation In Selected States

(Among non-residents of each state)



NOTE: Shows proportion of U.S. prime market tourists who show the likelihood of their visiting each state in the next few years with a "4" or "5" on a five-point scale ("5" is highest); only non-residents of each state being evaluated are included among those who rate that state.

The strongest interest in a Montana vacation is found among tourists in the Plains and Mountain states, rather than the Pacific coast states.

...Compared with the proportion of prime market population there relatively high proportions of tourists from the following areas say that a Montana pleasure trip is "possible" or "intended":

. Idaho, Utah, Wyoming; and

. Minneapolis/St. Paul, North Dakota, and South Dakota.

...Note that the proportion from Colorado, a populous mountain state, is not particularly high, however. In addition, the populations in several of these high-interest states is not very large, and therefore do not represent large markets.

...Not surprisingly, most of the states in which interest is high are ones which border Montana. Even so, tourists in Utah and Minneapolis/St. Paul are apt to show interest in Montana -- areas not bordering Montana.

...Tourists in Oregon and Washington are less likely to report that a Montana pleasure trip is "possible" or "likely," and those in populous northern California are the least likely.

INTEREST IN VISITING MONTANA IN U.S. PRIME MARKET

	Possible Future Vacation %	Intend To Visit %	BASE
U.S. Prime Market	38	17	505
Northern California	27	8	140
Oregon	35	15	72
Washington	34	15	98
Colorado	38	20	65
Idaho	47 ←	37 ←	19
Utah	48 ←	27 ←	33
Wyoming	62 ←	38 ←	8
Minneapolis/St. Paul	59 ←	22	46
North Dakota	45 ←	18	11
South Dakota	69 ←	31 ←	13

B. Interest Among Canadian Prime Market Tourists

We will now look at interest in visiting Montana among tourists from the Canadian prime market. Since the Canadian prime market is much smaller than the U.S. prime market, we will compare the two so that we can examine this market in perspective. Also, we will look at each half of the Canadian prime market separately, since there are dramatic differences between Calgary and Edmonton tourists.

Calgary tourists stand out from those in Edmonton and the U.S. prime market in their past visitation and interest in future visitation of Montana.

...They are dramatically more likely to have visited Montana on a pleasure trip in the last year than are either Edmonton tourists or U.S. prime market tourists (30% vs. 12% and 11%).

...Calgary tourists are much more likely to say that they might take a vacation trip to Montana in the next few years than are Edmonton or U.S. tourists (64% vs. 40% and 38%).

...Finally, Canadian prime market tourists living in Calgary are more apt than those living in Edmonton or U.S. prime markets to say that Montana is completely described as a place they want to visit (36% vs. 16% and 24%).

Clearly, Calgary is a strong potential market for Montana.

ORIENTATION TOWARDS MONTANA AMONG U.S., CALGARY, AND EDMONTON TOURISTS

	U.S.	Canada	
		Calgary	Edmonton
	%	%	%
Households Visited Montana In Past Year (Net)	11	30	12
Primary destination	3	14	2
Secondary destination	10	28	12
Possible future Montana vacation trip	38	64	40
Montana is described completely as a place I want to visit	24	36	16
BASE	505	50	50

Those who have taken a past-year pleasure trip to Montana are more likely to say another trip is "possible" or "likely" than are prime market tourists in general. This is particularly true among Canadian tourists.

ORIENTATION TOWARD VACATIONING IN MONTANA

Likelihood Of Visiting Montana	All Tourists		Total Visited Montana	
	U.S.	Canada	U.S.	Canada
	%	%	%	%
Possible (Total)	38	52	64	81
Intend	17	33	46	67
Not intend	21	18	18	14
Not Likely	62	48	36	19
BASE	505	100	55	21

Interim Summary

Quite a few tourists in the large U.S. prime market say they are likely to visit Montana in the next few years on a pleasure trip. Understandably, the highest interest is found in the states closest to Montana -- Idaho, Utah, Wyoming, and the Dakotas. Unfortunately, population in areas is low and dispersed. Minneapolis/St. Paul also contributes a relatively high proportion of interested tourists. This market may represent an opportunity for development, since convenient road and air transportation exists. A smaller proportion of tourists from the more populous Pacific states or Colorado are interested in Montana.

Many more tourists from Calgary than from Edmonton say they are interested in Montana.

A high proportion of recent previous visitors -- and especially of those who go to Montana as the primary destination -- say they want to go back. Thus, with a relatively secure return rate, Montana needs to focus on encouraging first-time exposure to the state.

V. OPPORTUNITIES FOR DEVELOPMENT

Introduction

In this chapter we will focus on those areas for which there is demand among tourists and Montana does or could offer. In other words, we will look at the opportunities for expansion of the tourist market in Montana. First we will consider development in the U.S. prime market, with reference to:

...Vacation elements often perceived available in Montana which need to be reinforced; and

...Vacation elements not widely perceived present in Montana but which would be expanded and developed.

Then we will consider the Canadian prime market in the same way. Reference to opportunities for foreign tourists will be made where appropriate.

A. Opportunities Among U.S. Prime Market Tourists

There is substantial demand in the U.S. market for the nature-oriented activities Montana is seen to offer.

...Large proportions have participated in nature-related activities on recent pleasure trips, such as:

. Fishing (58%);

. Camping/backpacking (63%); and

. Hiking (50%).

...In comparison with the percentages who have participated in these activities on a pleasure trip recently, sizable proprotions say that if they actually were to go on a Montana vacation trip they would go:

. Fishing (19%);

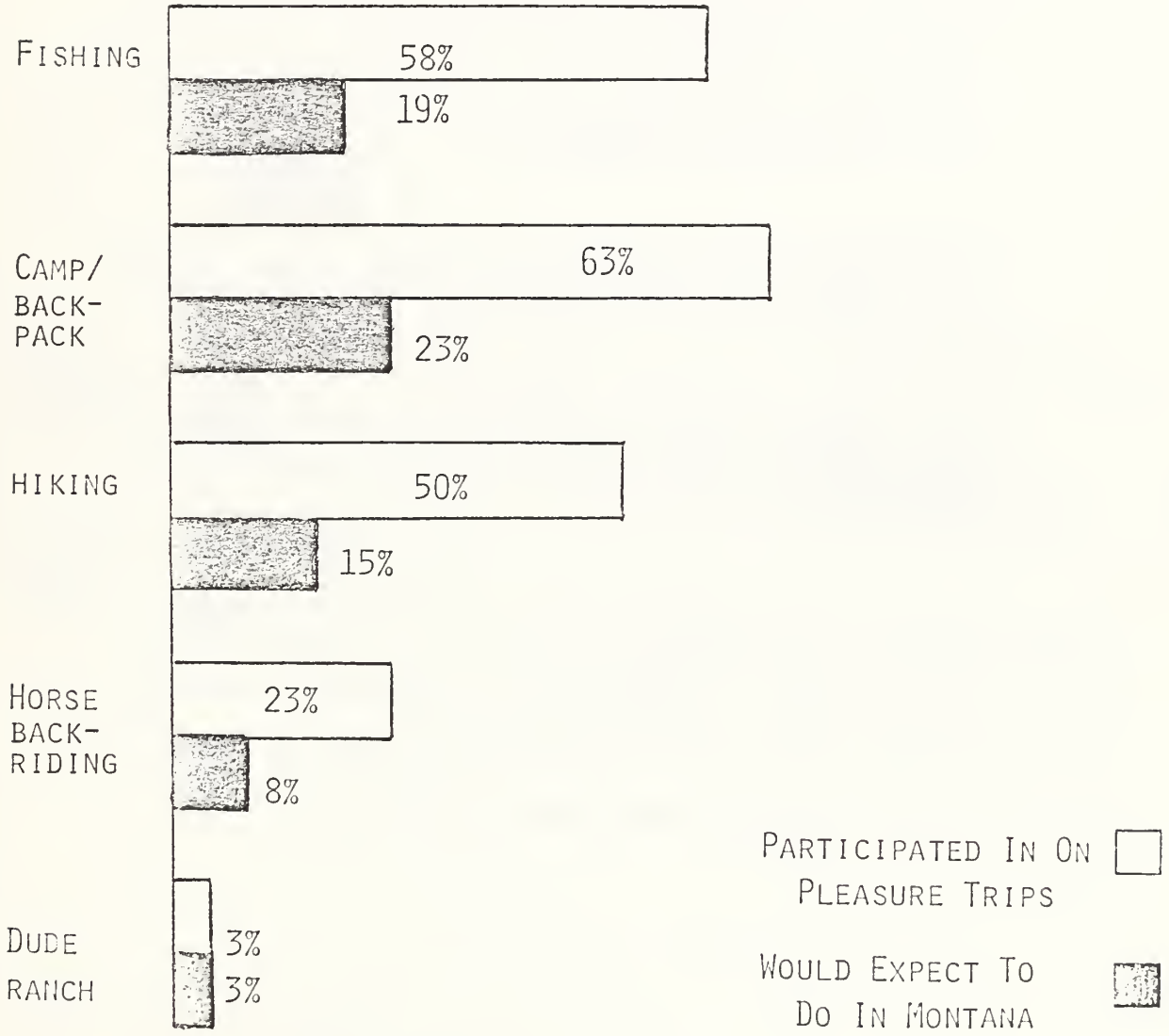
. Camping/backpacking (23%); and

. Hiking (15%).

...A small proportion (3%) have stayed at a dude ranch recently. However, the same proportion say they would stay at one if they went to Montana (3%). Thus, it appears that among the small, but important, segment that is interested in dude ranches, Montana is seen as a place for this activity. The task in addressing this market, then, is to continue reinforcing the appeal of Montana ranches while expanding the size of the market. Foreign tourists are reported by some tour operators to be

especially attracted to this Old West, nature and group-oriented type of vacation experience. Accommodation for foreign language-speaking tourists could be most easily made with this type of package vacation.

Participation In Nature-Oriented Activities Among U.S. Tourists



BASE = 505

Water sports, winter sports, and rodeos are activities for which there is a demand but which are not usually perceived to be things to do in Montana.

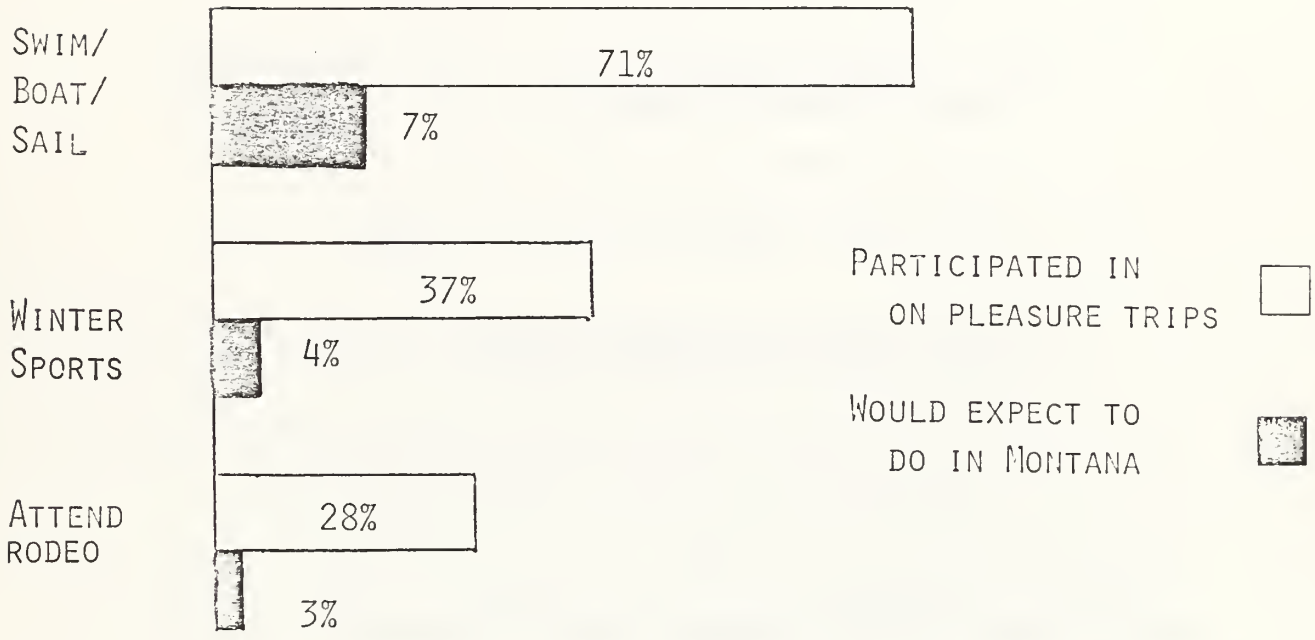
...While most (71%) American consumers went swimming/boating/sailing on a recent pleasure trip, only one-tenth as many (7%) say they would do the same if they were to take a trip to Montana. Many people may be unaware of Montana's lakes; others may discount water sports in Montana because they view the state as being too cold.

...A substantial minority (37%) have recently participated in winter sports on a vacation trip. However, about one-tenth as many (4%) mention that they would participate in winter sports if they actually took a Montana pleasure trip.

...While roughly one-quarter (28%) have attended a rodeo on a recent vacation trip, very few in comparison (3%) claim they would attend one if they were to go to Montana on a pleasure trip.

In sum, Montana is widely seen as the place for nature activities -- but only certain ones. By broadening its image beyond a destination for campers, hikers, and fisherman Montana may attract those looking for water sports, winter sports, and "Wild West" activities.

Available Activities Not Widely Associated With Montana By U.S. Tourists



BASE: 505

In addition, Montana has undeveloped potential in the U.S. market as an interesting destination featuring the historical Old West.

There appears to be a large demand for such a destination.

...The vast majority of U.S. tourists have visited museums or historical sites on recent pleasure trips (81%). This is a common vacation trip activity.

...And for large proportions of U.S. tourists Montana completely fits the description as:

. Having a cowboy and frontier flavor (44%); and

. The place to see Old West history (38%).

...Finally, most U.S. prime market tourists find it essential or important on a vacation trip to:

. Go to a place with many different things to do (64%); and

. Learn new things and have new experiences (70%).

However, few tourists currently think of Montana as a place to see interesting historical sites.

...Only one tourist in twenty (5%) says he would visit museums or historical sites if he went to Montana.

...Only small proportions feel Montana completely fits the description as:

. Having lots of different things to do (16%) or

. Having many interesting historical sites (16%).

Inexpensive accommodations, friendly people, and good food are aspects of a Montana vacation not generally associated by U.S. tourists with a Montana vacation, but are qualities more widely perceived with exposure to the state. Montana should emphasize these characteristics in its communications.

Relatively small proportions of U.S. prime market tourists say that Montana is described competely as a place that:

...Is inexpensive to stay in (10%);

...Has really friendly people (27%); and

...Has good food and restaurants (12%).

However, those who have taken a pleasure trip to Montana in the past year are significantly more apt to claim that Montana is completely described those ways.

	U.S. Tourists	
	Total	Visited Montana
Montana ...	%	%
Is inexpensive to stay in	10	27
Has really friendly people	27	42
Has good food and restaurants	12	27
BASE:	505	55

NOTE: Shows proportion saying phrase describes Montana completely by rating Montana "5" on a "1" to "5" scale.

B. Opportunities in the Canadian Prime Market

In considering areas for market development in Canada, the first idea to remember is that Canadians view Montana differently from U.S. tourists. While U.S. prime market tourists see the state as a location for nature-oriented activities, Canadians are more apt to think of more developed activities, such as shopping and skiing, as well as hiking, camping, and the like. Montana should be positioned accordingly in this market. A single approach for both markets would be wasteful.

The second concept to keep in mind is the difference in orientation towards Montana between tourists from Edmonton and those from Calgary. Calgary tourists are more positive towards Montana in many aspects than are Edmonton or even U.S. tourists, while in many ways Edmonton tourists are less positive than either Calgary or U.S. prime market tourists. In approaching the Canadian prime market, then, efforts should be focused on Calgary rather than Edmonton.

Understandably, Canadian tourists resemble U.S. prime market tourists in many ways. But their vacation experience and expectations differ in some important respects. We will look at these differences -- the basis for establishing a separate marketing effort for this market -- and compare their vacation orientation whith how they view Montana. This will allow us to see the distinctive opportunities for development of the Canadian prime market.

<u>While Canadian prime market tourists are somewhat less oriented towards nature-activities on vacations than are U.S. tourists, they are more likely to participate in water sports, winter activities, and to visit national parks.</u>

...Canadian tourists are about as likely to go camping/tenting, (63% vs. 60%) backpacking, (15% vs. 22%), horseback riding (19% vs. 23%), or to a dude ranch (5% vs. 3%) as are U.S. tourists. However, they are less apt to go fishing (46% vs. 58%) or hunting (11% vs. 22%) on a vacation trip. It may be hypothesized that Canadian tourists look for activities other than what is readily available to them at home when they go away for a vacation.

...On the other hand, they are more likely to participate in beach/water sports (92% vs. 83%), winter sports (64% vs. 37%) (especially downhill skiing (44% vs. 21%), or to visit a national park (92% vs. 75%) than are U.S. prime market tourists.

However, this difference in orientation does not necessarily translate into greater likelihood for Canadian tourists to participate in these activities on a vacation trip to Montana.

...It was already noted that Canadian tourists are less likely to plan on nature-oriented activities (54% vs. 24%) than are U.S. tourists.

...It was also noted that Canada tourists are much more apt to say they would visit Montana in winter and participate in winter activities (19% vs. 4%). This orientation should be encouraged, especially since it represents a tourist flow in a season other than summer. In addition, Canadian skiers are close Montana ski facilities are closer to Canadian skiers than are competitive facilities in Colorado, Wyoming, Utah, and Idaho.

...But they are a little more likely to plan on participating in beach/water sports (9% vs. 7%). Given the orientation of these tourists towards water activities, the facilities offered in Montana should be communicated, especially among those (Calgary) tourists for whom Montana is closer than the British Columbia coast.

...Even fewer Canadians mention visiting a park on a trip to Montana compared with U.S. tourists (2% vs. 8%). Clearly, Glacier and other parks are not commonly thought of as specific places to visit in Montana. Given the widespread visitation of parks by Canadian tourists, this represents undeveloped potential.

COMPARISON OF VACATION ACTIVITY PATTERNS
AMONG U.S. AND CANADIAN PRIME MARKET TOURISTS

Activities On Recent Pleasure Trips	U.S. %	Canada %
Camping/tenting	60	63
Fishing	58	46
Hunting	22	11
Backpacking	22	15
Horseback riding	23	19
Dude ranch	3	5
Beach/Water Sports (Net)	83	92
Ocean swimming	65	75
Lake/river swimming	60	69
Canoeing	20	31
Waterskiing/sailing/boating	43	43
Winter Sports (Net)	37	64
Downhill skiing	21	44
Cross-country skiing	10	24
Ice skating	11	25
Snowmobiling	12	18
Visit national parks	75	92
Anticipated Activities On Montana Trip		
Nature-oriented activities	54	24
Beach/water sports	7	9
Winter sports	4	19
Visit parks	8	2
BASE	505	100

APPENDIX

APPENDIX

The following items are contained in this appendix:

...Organizations contacted for secondary information;

...Publications reviewed;

...Household and population estimates for U.S. and Canadian prime markets;

...Northern California counties in which interviews were conducted;

...Screening questionnaire for focus group session; and

...U.S. tourist questionnaire.

TOURISM ORGANIZATIONS CONTACTED FOR SECONDARY DATA

Montana Department of Highways, Travel Promotion Unit

Montana Department of Labor and Industry

Montana Department of Fish, Widlife and Parks

Montana Travel Hosts

Montana Innkeepers Association

Automobile Association of America, Montana Office

University of Montana, Bureau of Business Research

Port of Portland

Wyoming Travel Commission

Washington Department of Commerce and Economic Development

Oregon Department of Transportation, Travel Information Section

Colorado Department of Natural Resources, Division of Parks and Outdoor Recreation

Colorado Department of Commerce and Development

South Dakota Department of Game, Fish and Parks

South Dakota Division of Tourism

North Dakota State Travel Division

Utah State University, Institute of Outdoor Recreation and Tourism

Travel Alberta, Division of Research and Analysis

Tourism British Columbia, Research Department

World Tourism Organization

Association of American Soceity of Travel Agents

Civil Aviation Aeronautics Board, Division of Financial and Traffic Data

New York Port Authority, Public Service Division

(CONTINUED)

TOURISM ORGANIZATIONS CONTACTED FOR SECONDARY DATA (CONTINUED)

American Bus Association

National Air Carrier Association

United States Travel Data Center

Department of Transportation, Division of Transportation Information

Four Corners Regional Commission/Foremost West

Old West Regional Commission

Western Analysis

International Air Transport Association

Field & Stream Magazine

Air Transport Association of America

Audubon Magazine

United States Department of Commerce, Bureau of the Census

United States Tour Operators Association

Dude Ranch Association

PUBLICATIONS REVIEWED FOR SECONDARY DATA

Travel Pulse, 1977/78 (Volume 2), Travel & Tourism Consultants International

Tourism: State Structure, Organization and Support, United States Travel Service

Travel Trends in the U.S. and Canada, 1978, The Travel Research Association

National Travel Survey, 4 quarters, 1979, United States Travel Data Center

1977 National Travel Expenditure Study, United States Travel Data Center

Survey of State Travel Offices, 1973/74, 78/79, United States Travel Data Center

Annual Report, 1978, National Air Carrier Association

Outlook for the U.S. Charter Airlines, 1979, National Air Carrier Association

Dimensions of Airline Growth, 1980, Boeing Commercial Airplane Company

Pacific Travel Tomorrow, 1975, Boeing Commercial Airplane Company

National Park Statistical Abstract, 1978/79, National Park Service

Frequency of Flying Among the General Public, 1979, Air Transport Association of America

Air Transport, 1980, Air Transport Assoication of America

Economic Importance of Tourism in Montana, 1975, USDA Forest Service

Montana Travel Study, 1966, University of Montana

Statewide Comprehensive Outdoor Recreation Plan, 1978, Montana Department of Fish & Game

Mini-profile: Montana Travel Industry, 1973, 1976, 1977, Travel Promotion Unit

(CONTINUED)

PUBLICATIONS REVIEWED FOR SECONDARY DATA (CONTINUED)

"Tourism or Timber?" Montana Business Quarterly, Autumn 1975, University of Montana

Old West Region Non-resident Travel, Tourism and Recreation Survey, Results For 1979 Montana Department of Fish, Wildlife and Parks

Parks Perspective, 1980, Montana Division of Fish, Wildlife and Parks

Travel Log, January-August 1980, Wyoming Travel Commission

Wyoming Travel Barometer, 1972-79, Wyoming Travel Commission

Air Passenger Origin/Destination Survey, 1974, 1978, Port of Portland

Survey of "Sunset" Ad Respondents, 1979/80, Oregon Department of Transportation

Travel Barometer, Oregon Department of Transportation

Travel News, Oregon Department of Transportation

State Park System Plan for South Dakota, 1978, South Dakota Department of Economic and Tourism Development.

Community Outdoor Recreation Assessment, 1980, South Dakota Department of Eonomic and Tourism Development

South Dakota Snowmobiling, South Dakota Department of Economic and Tourism Development

State Water Plan, 1978, South Dakota Department of Economic and Tourism Development

Recreational Trails Plan, 1980, South Dakota Department of Economic and Tourism Development

South Dakota Outdoor Recreation Plan, (Draft 1980, SCORP), South Dakota Department of Economic and Tourism Development

Colorado State Activity Days, (From 1980 SCORP), Colorado Office of Tourism

Tourism Statistics for 1979, Colorado Office of Tourism

Ten Great Escorted Vacations to All America, 1980, (brochure), Greyhound

(CONTINUED)

PUBLICATIONS REVIEWED FOR SECONDARY DATA (CONTINUED)

Alberta Travel Survey, 1976, Travel Alberta

British Columbia Tourism Development Strategy, 1980, Tourism British Columbia

Annual Report, 1979, Tourism British Columbia

Tourism British Columbia Marketing Plan, 1980, Tourism British Columbia

Tourism Highlights, 1978, Tourism British Columbia

Southwestern British Columbia Tourism Facts Book, 1977, Tourism British Columbia

Idaho/Montano/Wyoming Tour Book, 1980, Automobile Association of America

The Traveler, Utah and You, Utah Travel Council

Utah! Best of the West, 1979, (brochure), Utah Travel Council

Ski Utah -- Report of the Industry, 1978/79, Utah State University

Commercial Air Travel -- Fall, Summer, Winter 1979, Utah State University

Motor Vehicle Travel -- Summer 1977, Utah State University

Membership Directory, 1980, United States Tour Operators Association

Field & Stream Leisure Time Survey, 1979, Field & Stream Magazine

Audubon Readership Survey, 1979, Audubon Magazine

Travel, Tourism & Outdoor Recreation, 1976/77, Statistics Canada

Travel Between Canada and Other Countries, 1978, 1979, 1980, Statistics Canada

A Descriptive Analysis of Montana's Forest Resources, 1975, USDA Forest Services

Dude Ranch Vacation Directory, Dude Ranchers Association

HOUSEHOLD COUNT AND POPULATION OF PRIME MARKET

	Households (In Thousands)	Population (In Thousands)
Prime Market Total	8,259.6	21, 734.1
U.S. Prime Market	7,812.0	20,434.2
Northern California	2,371.5	5,023.3
Oregon	939.7	2,534.5
Washington	1,436.6	3,911.1
Idaho	310.0	914.7
Utah	412.9	1,363.4
Colorado	995.1	2,783.9
Wyoming	162.3	458.2
North Dakota	221.4	668.1
South Dakota	241.4	702.4
Minneapolis/St. Paul SMSA	721.1	2,074.6
Canadian Prime Market	447.6	1,299.9
Edmonton MA	211.4	609.2
Calgary MA	236.2	690.7

NOTE: Shows S&MM estimates for 12/31/79; Northern California defined by counties listed separately; SMSA = Standard Metropolitan Statistical Area; MA = Metropolitan Area.

SOURCE: 1980 Survey Of Buying Power, Sales And Marketing Management.

1980 POPULATION ESTIMATE FOR NORTHERN CALIFORNIA COUNTIES IN U.S. PRIME MARKET

	POPULATION (In Thousands)
Alameda	71.3
Alpine	0.8
Amador	18.5
Butte	136.9
Calaveras	19.6
Colusa	13.2
Contra Costa	641.8
Del Norte	16.6
El Dorado	81.7
Glenn	20.6
Humboldt	110.4
Lake	32.1
Lassen	20.2
Marin	226.0
Mendocino	65.8
Modoc	8.9
Mono	8.3
Napa	95.5
Nevada	46.4
Placer	111.1
Plumas	15.5
Sacramento	760.2
San Francisco	647.0
San Joaquin	322.1
San Mateo	593.1
Shasta	110.0
Sierra	3.2

(CONTINUED)

1980 POPULATION ESTIMATE FOR NORTHERN CALIFORNIA COUNTIES IN U.S. PRIME MARKET

(CONTINUED)

	POPULATION (In Thousands)
Siskiyou	37.7
Solano	217.0
Sonoma	282.5
Sutter	49.9
Tehama	37.3
Trinity	12.0
Tuolumne	32.2
Yolo	109.2
Yuba	48.7
TOTAL	5023.3

Source: 1980 Survey Of Buying Power, Sales and Marketing Management, Population Estimates for 12/31/79

QUESTIONNAIRE

VACATION TRAVEL STUDY -- SCREENER

5-1

ASK TO SPEAK TO MALE OR FEMALE HEAD OF HOUSEHOLD

Hello. My name is _____ of Davidson-Peterson Associates, a New York based marketing research firm. We're doing a study on people's vacation travel, where they go, why they go there, and what they think of different vacation destinations. I'd like to get your views.

1. First, do you or does anyone in your household work for an advertising agency, a market research company, or a firm in the tourism or travel industry?

YES ( ) → TERMINATE → | 1 2 3 4 5 6 7 8 9 | (6)

NO ( )

2. During the past year, have you or has anyone in your household taken a pleasure or vacation trip to or within the United States or Canada that lasted at least one night or more away from home?

YES ( )

NO ( ) → TERMINATE →

01	02	03	04	05	06	07	08	09	10
11	12	13	14	15	16	17	18	19	20

(7/8)

3. Which one person, of 18 years of age or older, was primarily responsible for planning such trips, that is, for deciding where to go and what to do there? (RECORD BELOW)

		Q.3	PERSON CHOSEN
SELF:	( ) MALE	9( )-1	10( )-1
	( ) FEMALE	( )-2	( )-2
SPOUSE/ COVIVANT:	( ) MALE	( )-3	( )-3
	( ) FEMALE	( )-4	( )-4
OTHER HOUSEHOLD MEMBERS:	( ) MALE	( )-5	( )-5
	( ) FEMALE	( )-6	( )-6

IF ONE PERSON..... Speak with him/her.
IF MORE THAN ONE PERSON... Speak with person on checked line, or first trip planner down from check. Put a check under "Person Chosen".
IF RESPONDENT UNAVAILABLE..Arrange for callback.

DATE: _____ TIME: _____

IF NO CALLBACK POSSIBLE, ASK:

4. How many such trips did you or did other members of your household take during the past year?

TRIPS: _____ → (TERMINATE. KEEP SCREENER) (11/12)

QUALIFIED BUT REFUSED: | 1 2 3 4 5 6 7 8 9 | (13)

NAME: _____ TELEPHONE: (___) _____

ADDRESS: _____ CITY: _____

STATE: _____ ZIP CODE: ___ ___ ___ ___ ___ (14 15 16 17 18)

INTERVIEWED BY: _____ DATE: _____

TIME BEGUN: _____ TIME ENDED: _____

VALIDATED BY: _____ DATE: _____

CALIFORNIA	( )-1	SOUTH DAKOTA	( )-5
IDAHO	( )-2	UTAH	( )-6
NORTH DAKOTA	( )-3	WASHINGTON	( )-7
OREGON	( )-4	WYOMING	( )-8
		MINNEAPOLIS	( )-9
		COLORADO	( )-0
		EDMONTON	( )-X
		CALGARY	( )-Y

(19)

VACATION TRAVEL STUDY -- MAIN QUESTIONNAIRE

1a. When you think of taking a vacation within the United States or Canada, which state, province, city, or other area comes to mind first? (RECORD BELOW)

1b. What others come to mind? (RECORD BELOW)

2a. During the past year, have you heard or seen any travel or vacation advertising for vacation destinations within the United States or Canada?

YES ( )-1 NO ( )-2 ⟶ (SKIP TO Q.3) (20)

IF "YES" IN Q.2a, ASK:

2b. For which U.S. or Canadian vacation destinations have you heard or seen advertising? What others? (RECORD BELOW)

	Q.1a	Q.1b	Q.2b
ALASKA	21 ( )-1	24 ( )-1	27 ( )-1
ALBERTA	( )-2	( )-2	( )-2
ARIZONA	( )-3	( )-3	( )-3
BRITISH COLUMBIA	( )-4	( )-4	( )-4
CALIFORNIA	( )-5	( )-5	( )-5
CARIBBEAN (BAHAMAS, BERMUDA, ETC.)	( )-6	( )-6	( )-6
COLORADO	( )-7	( )-7	( )-7
DISNEYLAND	( )-8	( )-8	( )-8
DISNEY WORLD (WALT DISNEY WORLD)	( )-9	( )-9	( )-9
HAWAII	( )-0	( )-0	( )-0
FLORIDA	( )-x	( )-x	( )-x
GLACIER NATIONAL PARK	( )-y	( )-y	( )-y
GRAND CANYON	22 ( )-1	25 ( )-1	28 ( )-1
IDAHO	( )-2	( )-2	( )-2
LAS VEGAS	( )-3	( )-3	( )-3
LOS ANGELES	( )-4	( )-4	( )-4
MEXICO	( )-5	( )-5	( )-5
MANITOBA	( )-6	( )-6	( )-6
MONTANA	( )-7	( )-7	( )-7
NEVADA	( )-8	( )-8	( )-8
NEW MEXICO	( )-9	( )-9	( )-9
NEW YORK	( )-0	( )-0	( )-0
NORTH DAKOTA	( )-x	( )-x	( )-x
OREGON	( )-y	( )-y	( )-y
SAN FRANCISCO	23 ( )-1	26 ( )-1	29 ( )-1
SASKATCHEWAN	( )-2	( )-2	( )-2
SOUTH DAKOTA	( )-3	( )-3	( )-3
UTAH	( )-4	( )-4	( )-4
VANCOUVER	( )-5	( )-5	( )-5
WASHINGTON (STATE)	( )-6	( )-6	( )-6
WYOMING	( )-7	( )-7	( )-7
YELLOWSTONE NATIONAL PARK	( )-8	( )-8	( )-8
YOSEMITE NATIONAL PARK	( )-9	( )-9	( )-9
OTHER (SPECIFY:)			
_____	( )-0	( )-0	( )-0
_____			
_____			

3a. I would like you to think about the vacation or pleasure trips you have taken in the past several years -- the ones that lasted one night or more away from home. Think about what you did on those trips. As I read you a list of several activities, please tell me whether or not you have participated in them. Remember, I want to know what you have done on your vacation trips only -- even if you have participated in these activities at other times. First, on a vacation trip, have you gone... (READ LIST. CHECK "YES" OR "NO FOR EACH.)

START		YES	NO
[ ] Swimming or sunbathing at an ocean beach	30	( )-1	( )
[ ] Swimming or sunbathing at a lake or river		( )-2	( )
[ ] Canoeing		( )-3	( )
[ ] Waterskiing/sailing/powerboating		( )-4	( )
[ ] Fishing		( )-5	( )
[ ] Hunting		( )-6	( )
[ ] To play tennis or golf		( )-7	( )
[ ] Horsebackriding		( )-8	( )
[ ] On a day hike (at least several hours)		( )-9	( )
[ ] Camping or tenting at a campground		( )-0	( )
[ ] Backpacking on a wilderness trip		( )-x	( )
[ ] To stay at a dude ranch		( )-y	( )
[ ] To attend a rodeo	31	( )-1	( )
[ ] Off-highway traveling in a recreational vehicle		( )-2	( )
[ ] Cross-country skiing		( )-3	( )
[ ] Downhill skiing		( )-4	( )
[ ] Ice skating		( )-5	( )
[ ] Snowmobiling		( )-6	( )
[ ] To a national park		( )-7	( )
[ ] To see natural attractions		( )-8	( )
[ ] To visit museums or historical sites		( )-9	( )
[ ] To visit amusement parks		( )-0	( )
[ ] To a state fair		( )-x	( )
[ ] To attend plays/live theater		( )-y	( )
[ ] To attend opera/ballet/classical concerts	32	( )-1	( )
[ ] Dancing or to a disco		( )-2	( )
[ ] To a nightclub or stage show		( )-3	( )
[ ] Gambling		( )-4	( )
[ ] To horse races/race tracks		( )-5	( )
[ ] To baseball/footbal/other sports events		( )-6	( )

3b. On the vacations you've taken in the past several years, have you... (READ OFF)

	YES	NO
TAKEN A GUIDED TOUR WHERE YOU TRAVELED WITH A GROUP AND A TOUR DIRECTOR FOR SEVERAL DAYS	( )-7	( )
TAKEN A GUIDED TOUR WHERE A GROUP WENT WITH A TOUR DIRECTOR FOR AN HOUR OR MORE	( )-8	( )
TAKEN A SELF-GUIDED WALKING OR DRIVING TOUR WHERE YOU FOLLOWED PRINTED DIRECTIONS OR A TAPE	( )-9	( )

4. Each of us has different views about our vacations. I would like to know your thoughts about what is important to you on a vacation. Think about the kind of vacation you like to take. As I read each statement, tell me whether it is absolutely essential to you, important but not essential, nice to have or something you'd rather not have on a vacation. First... (READ CHECKED ITEM) How important to you is that on a vacation? (CONTINUE FOR EACH ITEM)

START	ABSOLUTELY ESSENTIAL	IMPORTANT BUT NOT ESSENTIAL	NICE TO HAVE	RATHER NOT HAVE	
[ ] Getting dressed up and going out to fancy restaurants	1	2	3	4	(33)
[ ] Getting away from all the crowds . . .	1	2	3	4	(34)
[ ] Going to someplace that's not far to travel	1	2	3	4	(35)
[ ] Staying at a luxury hotel	1	2	3	4	(36)
[ ] Getting "into" nature	1	2	3	4	(37)
[ ] Getting a lot of sun, sand, and sea	1	2	3	4	(38)
[ ] Getting out into the wide, open country	1	2	3	4	(39)
[ ] Not having to drive	1	2	3	4	(40)
[ ] Not spending a lot of money	1	2	3	4	(41)
[ ] Having a very action-filled, exciting time	1	2	3	4	(42)
[ ] Getting lots of rest and relaxation .	1	2	3	4	(43)
[ ] Going to a place good for a family vacation	1	2	3	4	(44)
[ ] Going to a place with many different things to do	1	2	3	4	(45)
[ ] Learning new things and having new experiences	1	2	3	4	(46)
[ ] Going somewhere where there are mountains	1	2	3	4	(47)
[ ] Going someplace different and far from home	1	2	3	4	(48)

Now, I'd like you to think about the trips you took during the past 12 months that lasted at least one night away from home, and that were taken for pleasure reasons. Do not include trips taken exclusively for business purposes, for personal or family emergency, trips to a second home, or trips to and from school. Just think about where you went on these trips, that is, the destinations at which you spent the most time.

5a. We will start with pleasure trips you might have taken one year ago -- last fall. How many pleasure trips, if any, did you take in September, October, or November 1979 on which you stayed away from home for at least one night? (RECORD BELOW) In what state did you spend the most time on each of those trips? (CIRCLE UNDER STATE LISTED OR WRITE IN UNDER "OTHER" IF NOT LISTED) Which of those trips, if any, lasted seven days or longer? (RECORD BELOW)

5b. During the winter months -- December 1979 and January and February of this year -- how many pleasure trips, if any, did you take in which you stayed away from home for at least one night? (RECORD BELOW) In which state did you spend most of your time on each of those trips? (RECORD BELOW AS ABOVE) And which of those trips, if any, lasted at least seven days? (RECORD BELOW)

5c. What about the spring months of March, April, and May? How many pleasure or vacation trips, if any, did you take during those months on which you stayed away from home for one night or more? In what state did you spend the most time on each of those trips? Which of those trips, if any, lasted for seven days or more?

5d. Finally, what about your pleasure or vacation trips this past summer -- those in June, July, August and including Labor Day? How many trips, if any, did you take for pleasure during those months? In what state did you spent most of the time on each trip? Which of those trips, if any, were seven or more days long?

		NUMBER OF TRIPS	PRIMARY DESTINATION: MONTANA () 01; ALBERTA () 02; BRITISH COLUMBIA () 03; CALIFORNIA () 04; COLORADO () 05; IDAHO () 06; MINNESOTA () 07; N./S. DAKOTA () 08; OREGON () 09; SASKATCHEWAN () 10; UTAH () 11; WASH. (STATE) () 12; WYOMING () 13; OTHER _____	TRIP LENGTH	7 DAYS YES	7 DAYS NO
( )	5a. FALL	01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(49-50)	11( )	-1 ( )
( )		01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(51-52)		( ) -2 ( )
( )	#TRIPS____	01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(53-54)		( ) -3 ( )
( )		01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(55-56)		( ) -4 ( )
( )	5b. WINTER	01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(57-58)		( ) -5 ( )
( )		01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(59-60)		( ) -6 ( )
( )	#TRIPS____	01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(61-62)		( ) -7 ( )
( )		01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(63-64)		( ) -8 ( )
( )	5c. SPRING	01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(65-66)		( ) -9 ( )
( )		01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(67-68)		( ) -0 ( )
( )	# TRIPS____	01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(69-70)		( ) -x ( )
( )		01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(71-72)		( ) -y ( )
( )	5d. SUMMER	01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(73-74)	12( )	-1 ( )
( )		01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(75-76)		( ) -2 ( )
( )	#TRIPS____	01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(77-78)		( ) -3 ( )
( )		01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(79-80)		( ) -4 ( )
				CARD 2	5-2	
( )		01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(7-8)		( ) -5 ( )
( )		01	02 03 04 05 06 07 08 09 10 11 12 13 _____	(9-10)		( ) -6 ( )

IF ONE MONTANA TRIP.....Ask Q. 6-15 about that trip.
IF MORE THAN ONE MONTANA TRIP..Ask Q. 6-15 about trip on line with check, or first Montana trip down from check.
IF NO MONTANA TRIPS..... Skip to Q. 15a.

I'd like to ask you about just one trip. Please think about the trip you made to (STATE) in the (SEASON) of 19(YEAR).

1/7-8=55
2/1-12

13-rej
14-rej

FOR MONTANA TRIPS ONLY:

6. Where in Montana did you spend the most time on this trip?

BILLINGS	15 ( )-1	HELENA	16 ( )-1
BOZEMAN	( )-2	KALISPELL	( )-2
BIG MOUNTAIN	( )-3	LEWISTON	( )-3
BIG SKY	( )-4	MILES CITY	( )-4
BUTTE	( )-5	MISSOULA	( )-5
CUSTER NATIONAL FOREST	( )-6	RED LODGE	( )-6
FORT BENTON	( )-7	WEST YELLOWSTONE	( )-7
FORT PECK LAKE	( )-8	YELLOWSTONE NATIONAL PARK	( )-8
GALLATIN NATIONAL FOREST	( )-9	OTHER:_____	( )-9
GLACIER NATIONAL PARK	( )-0		
GREAT FALLS	( )-X		

ASK ALL:

7. Regardless of other people who may have been with you on this trip, how many people from your household went on this trip, including yourself?

1 2 3 4 5 6 7 8 9 OR MORE (17)

8a. In total, how many nights were you away from home on this trip?

NIGHTS: _____ (18)

FOR MONTANA TRIPS:

8b. And, how many nights in total did you spend in Montana?

NIGHTS: _____ (19)

ASK ALL:

9. What means of transportation did you use in the course of your trip? (CHECK AS MANY AS APPLY)

PRIVATE AUTOMOBILE/CAR/VAN	( )-1	(20)
RENTAL CAR	( )-2	
CAMPER TRUCK/SLEEPER TRAILER	( )-3	
AIRPLANE	( )-4	
BUS	( )-5	
TRAIN	( )-6	
MOTOR HOME	( )-7	
OTHER:_____	( )-8	

10. For this trip, did you purchase a packaged tour which included overnight accommodations, rental car, sightseeing, or theatre tickets?

YES ( )-1 NO ( )-2 (21)

11. What would you say was the main purpose of this trip? (DO NOT READ LIST)

VISIT FRIENDS AND RELATIVES	( )-1 ——► (SKIP TO Q.13)	(22)
OUTDOOR RECREATION	( )-2	
ENTERTAINMENT/THEATRE	( )-3	
SIGHTSEEING	( )-4	
SHOPPING	( )-5	
OTHER:_____	( )-6	

12. Did you happen to visit friends or relatives on this trip?

YES ( )-1 NO ( )-2 (23)

2//15-23

13a. Thinking about all the things you did while on that trip, what would you say was the one main activity you engaged in while on that trip? (RECORD BELOW. DO NOT READ LIST.)

13b. What other activities did you engage in? What other outdoor activities? What other indoor activities or entertainment? (RECORD BELOW. DO NOT READ LIST.)

		Q.13a		Q.13b	
BEACH/WATER SPORTS					
SWIMMING/SURFING/SUNBATHING AT THE OCEAN	24	( )-1		28 ( )-1	
SWIMMING/SUNBATHING AT A LAKE, RIVER, ETC.		( )-2		( )-2	
CANOEING		( )-3		( )-3	
POWER BOATING/SAILING/WATERSKIING		( )-4		( )-4	
OUTDOOR ACTIVITIES					
FISHING		( )-5		( )-5	
HUNTING		( )-6		( )-6	
TENNIS/GOLF		( )-7		( )-7	
HORSEBACK RIDING		( )-8		( )-8	
BICYCLING		( )-9		( )-9	
DAY HIKING		( )-0		( )-0	
CAMPING/TENTING/AT A CAMPGROUND		( )-X		( )-X	
BACKPACKING		( )-Y		( )-Y	
DUDE RANCH	25	( )-1		29 ( )-1	
RODEO		( )-2		( )-2	
RECREATIONAL VEHICLE (RV)		( )-3		( )-3	
WINTER SPORTS					
DOWNHILL SKIING		( )-4		( )-4	
CROSS COUNTRY SKIING		( )-5		( )-5	
ICE SKATING		( )-6		( )-6	
SNOWMOBILING		( )-7		( )-7	
SPECTATOR SPORTS					
HORSE RACES/RACE TRACKS		( )-8		( )-8	
MOTOR CAR RACES		( )-9		( )-9	
BASEBALL/FOOTBALL/SOCCER		( )-0		( )-0	
SIGHTSEEING/ATTRACTIONS					
TOOK GUIDED TOURS		( )-X		( )-X	
VISITED MUSEUMS/HISTORICAL SITES		( )-Y		( )-Y	
VISITED AMUSEMENT PARKS	26	( )-1		30 ( )-1	
VISITED NATIONAL PARKS		( )-2		( )-2	
VISITED NATURAL ATTRACTIONS		( )-3		( )-3	
ATTENDED STATE FAIR		( )-4		( )-4	
NIGHTLIFE					
PLAYS/LIVE THEATRE		( )-5		( )-5	
OPERA/BALLET/CLASSICAL CONCERTS		( )-6		( )-6	
NIGHTCLUBS/STAGE SHOWS		( )-7		( )-7	
DANCING/DISCO		( )-8		( )-8	
GAMBLING		( )-9		( )-9	
OTHER ENTERTAINMENT					
INDOOR GAMES		( )-0		( )-0	
WATCHING TV		( )-X		( )-X	
ARTS/CRAFTS/HOBBIES		( )-Y		( )-Y	
OTHER ACTIVITIES					
RELAXING/RESTING	27	( )-1		31 ( )-1	
VISITING FRIENDS/RELATIVES		( )-2		( )-2	
BUSINESS/CONVENTION/MEETING		( )-3		( )-3	
SHOPPING		( )-4		( )-4	
ANTIQUING		( )-5		( )-5	
TAKING PICTURES		( )-6		( )-6	
OTHER: _____					

14a. When you were planning this trip, why did you decide to choose _____ (DESTINATION) as your primary destination? (PROBE:) What about it appealed to you? What made it better than other places to go? What else?

32-
33-
34-

14b. About how many months before your trip did you make the decision to go there?

1 2 3 4 5 6 7 8 9 10 11 12 or more
0 X Y (35)

15a. In the next year or so do you plan to take a vacation or pleasure trip involving at least one night away from home during the summer?

YES ( )-1 → (ASK Q.15b) NO ( )-2 → (SKIP TO Q.15c) (36)

IF "YES", ASK:

15b. What major activities do you plan to engage in on that trip?

37-
38-
39-

15c. In the next year or so do you plan to take a vacation or pleasure trip involving at least one night away from home during the winter?

YES ( )-1 → (ASK Q.15d) NO ( )-2 → (SKIP TO Q.16) (40)

IF "YES", ASK:

15d. What major activities do you plan to engage in on that trip?

41-
42-
43-

16. I'll read you a list of states, provinces, and parks. For each one, please tell me how likely you think you will be to take a pleasure or vacation trip to that area in the next several years. We'll use a 1 to 5 scale, where a "1" means that you think you are not at all likely to take a pleasure or vacation trip there in the next several years and "5" means that you think that you are very likely to do so. You can use any number between 1 and 5, depending on how likely you think you are to go there. First ... (START WITH CHECKED STATE/PROVINCE)

[START HERE]	STATES/PROVINCES	NOT AT ALL LIKELY				VERY LIKELY
[ ]	ALBERTA, CANADA	1	2	3	4	5 (44)
[ ]	BRITISH COLUMBIA, CANADA	1	2	3	4	5 (45)
[ ]	CALIFORNIA	1	2	3	4	5 (46)
[ ]	COLORADO	1	2	3	4	5 (47)
[ ]	GLACIER NATIONAL PARK	1	2	3	4	5 (48)
[ ]	IDAHO	1	2	3	4	5 (49)
[ ]	MONTANA	1	2	3	4	5 (50)
[ ]	OREGON	1	2	3	4	5 (51)
[ ]	SASKATCHEWAN, CANADA	1	2	3	4	5 (52)
[ ]	UTAH	1	2	3	4	5 (53)
[ ]	WASHINGTON STATE	1	2	3	4	5 (54)
[ ]	WYOMING	1	2	3	4	5 (55)
[ ]	YELLOWSTONE NATIONAL PARK	1	2	3	4	5 (56)

IF '1' OR '2', DO NOT ASK Q.17 SKIP TO Q. 18a.

17a. There are many places we might go on a vacation or pleasure trip. I would like to know whether or not you are presently actually considering taking such a trip to or within Montana in the next year or two?

YES ( )-1 ⟶ (ASK Q.17b) NO ( )-2 ⟶ (SKIP TO Q.18a) (57)

IF "YES", ASK:

17b. In what season do you think you will take this trip?

WINTER ( )-1 SPRING ( )-2 SUMMER ( )-3 FALL ( )-4 (58)

17c. What means of transportation do you expect to use on this trip? (59)

PRIVATE AUTOMOBILE/CAR/VAN	( )-1
RENTAL CAR	( )-2
CAMPER TRUCK/SLEEPING TRAILER	( )-3
AIRPLANE	( )-4
BUS	( )-5
TRAIN	( )-6
MOTOR HOME	( )-7
OTHER: _____	( )-8

17d. About how many nights, if any, do you expect you would spend in Montana?

0 1 2 3 4 5 6 7 8 9 or more (60)

18a. Thinking just about Montana as a place to go on vacation, what, if anything, do you feel would appeal to you about going there? What else? (PROBE:)

61-

62-

63-

18b. What, if anything, does not appeal to you about Montana as a place to go on vacation? What else? (PROBE:) Can you think of any (other) disadvantages of going there on vacation?

64-

65-

66-

19a. Whether or not you are really planning to take a pleasure trip to Montana, let's just assume you were going to take a vacation there for at least five days. Where do you think you would go in Montana?

BILLINGS	67	( )-1	HELENA	68	( )-1
BOZEMAN		( )-2	KALISPELL		( )-2
BIG MOUNTAIN		( )-3	LEWISTOWN		( )-3
BIG SKY		( )-4	MILES CITY		( )-4
BUTTE		( )-5	MISSOULA		( )-5
CUSTER NATIONAL FOREST		( )-6	RED LODGE		( )-6
FORT BENTON		( )-7	WEST YELLOWSTONE		( )-7
FORT PECK LAKE		( )-8	YELLOWSTONE NATIONAL PARK		( )-8
GALLATIN NATIONAL FOREST		( )-9	OTHER_____		( )-9
GLACIER NATIONAL PARK		( )-0	DON'T KNOW		( )-0
GREAT FALLS		( )-X	WOULDN'T GO THERE AT ALL		( )-X

19b. What would you expect to do on your vacation there? 69-

70-

19c. Now, give me three or four words that describe how you view Montana as a place to go for a vacation.

_____ _____ _____ _____

71-
72-
73-
74-
75-
76-
77-
78-
79-
80-

20. I am going to read you several phrases or words. Some people think they describe Montana, others do not. We will use a 1 to 5 scale again, in which a 5 means the phrase describes Montana completely and a 1 means it does not describe Montana at all. You can use any number between 1 and 5, depending on how well you think the phrase describes Montana. First ... (START WITH CHECKED ITEM)

[START HERE]	DOES NOT DESCRIBE AT ALL				5-3 DESCRIBES COMPLETELY	
[ ] Expensive to get to	1	2	3	4	5	(6)
[ ] A great place for skiing.	1	2	3	4	5	(7)
[ ] Has really friendly people.	1	2	3	4	5	(8)
[ ] Offers nothing to do	1	2	3	4	5	(9)
[ ] Inexpensive to stay there	1	2	3	4	5	(10)
[ ] A place I would drive to	1	2	3	4	5	(11)
[ ] A place that's different and unique	1	2	3	4	5	(12)
[ ] A place I feel familiar with . . .	1	2	3	4	5	(13)
[ ] Easy to get to	1	2	3	4	5	(14)
[ ] One of the most beautiful states .	1	2	3	4	5	(15)
[ ] A place I want to visit	1	2	3	4	5	(16)
[ ] Has many interesting historical sites	1	2	3	4	5	(17)
[ ] A good place to get away from crowds	1	2	3	4	5	(18)
[ ] Takes too long to get to	1	2	3	4	5	(19)
[ ] Offers active, exciting nightlife	1	2	3	4	5	(20)
[ ] The place to see old west history	1	2	3	4	5	(21)
[ ] Is hard to get information about it	1	2	3	4	5	(22)
[ ] Has good food and restaurants	1	2	3	4	5	(23)
[ ] Has a cowboy and frontier flavor	1	2	3	4	5	(24)
[ ] Has the most spectacular scenery around . . .	1	2	3	4	5	(25)
[ ] Is cleaner than other states around	1	2	3	4	5	(26)
[ ] A good place for a family vacation with the children		2	3	4	5	(27)
[ ] Good place for rest and relaxation	1	2	3	4	5	(28)
[ ] Has lots of different things to do	1	2	3	4	5	(29)
[ ] Good place to see wildlife	1	2	3	4	5	(30)
[ ] Lots of wide, open space	1	2	3	4	5	(31)

21a. Some vacation destinations advertise a lot and others do not. Do you happen to recall seeing any advertising for Montana in the last year or so?

YES ( )-1 ⟶ (ASK Q.20b) NO ( )-2 ⟶ (SKIP TO Q.21) (32)

IF "YES", ASK:

21b. What do you remember about this advertising? What else did it say or show? What else? (PROBE)

33-

34-

22a. Now, think once more about all the pleasure trips you took in the past twelve months. On how many trips, if any, did you stay overnight in Montana for at least one night even though Montana was not the primary destination of the trip?

0 1 2 3 4 5 6 7 8 9 or more (35)

↓

SKIP TO Q.A

IF ONE OR MORE IN Q.A, ASK:

22b. How many people from your household, including yourself, went on the (FIRST) trip to Montana? And how many nights did you spend in Montana on that trip? (RECORD BELOW. CONTINUE FOR EACH TRIP.)

	TRIP #								
	1	2	3	4	5	6	7	8	9
# PEOPLE	(36)	(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)
# NIGHTS	(45/46)	(47/48)	(49/50)	(51/52)	(53/54)	(55/56)	(57/58)	(59/60)	(61/62)

MAKE SURE THERE IS A TRAVEL PARTY SIZE AND LENGTH OF TRIP IN MONTANA FOR EACH TRIP TAKEN.

CLASSIFICATION

Now I have just a few more questions, for statistical purposes only. The answers to these questions, as well as your answers to all the questions so far, will, of course, be kept in the strictest confidence.

A. What is your age please? Are you ... (READ OFF) 63-rej

(64)

18 - 24 ( )-1
25 - 29 ( )-2
30 - 34 ( )-3
35 - 39 ( )-4
40 - 44 ( )-5
45 - 49 ( )-6
50 - 54 ( )-7
55 - 59 ( )-8
60 - 64 ( )-9
65 OR OLDER ( )-0

B. What was the last year of schooling you personally completed?

(65)

GRADE SCHOOL ( )-1
SOME HIGH SCHOOL ( )-2
HIGH SCHOOL GRADUATE ( )-3
SOME COLLEGE ( )-4
COLLEGE GRADUATE ( )-5
POSTGRADUATE WORK ( )-6
TECHNICAL SCHOOL ( )-7

C. Which of the following best describes your current living situation ... (READ OFF)

(66)

I AM MARRIED AND LIVING WITH MY SPOUSE ( )-1
I AM LIVING WITH MY PARENTS OR OTHER ADULT FAMILY MEMBERS ( )-2
I AM THE ONLY ADULT IN MY HOUSEHOLD ( )-3
I AM LIVING WITH OTHER ADULTS, NOT FAMILY MEMBERS ( )-4

D. Including yourself, how many people are there in your household? Please include household members who may presently be away at school.

TOTAL # PEOPLE _____ (67)

E. Are any of those household members children under the age of 18?

YES ( )-1 NO ( )-2 ⟶ (SKIP TO Q.G) (68)

IF "YES" IN Q.E, ASK:

F. How many are ... (READ OFF) (69)

CHILDREN UNDER 6 _____ (70)

CHILDREN 6 TO 12 _____ (71)

CHILDREN 13 TO 17 (TEENAGERS) _____

G. What is the occupation of the major wage earner in your household?

_____ (72)

In what industry is that?

_____

H. Are you the major wage earner for your household?

YES ( )-1 ⟶ (SKIP TO Q.K) NO ( )-2 (73)

IF "NO" IN Q.H, ASK:

I. What is the age of the major wage earner in your household? (74)

UNDER 18	( )-1	45 - 49	( )-7
18 - 24	( )-2	50 - 54	( )-8
25 - 29	( )-3	55 - 59	( )-9
30 - 34	( )-4	60 - 64	( )-0
35 - 39	( )-5	65 OR OLDER	( )-X
40 - 44	( )-6		

J. What was the last year of schooling completed by the major wage earner? (75)

GRADE SCHOOL	( )-1
SOME HIGH SCHOOL	( )-2
HIGH SCHOOL GRADUATE	( )-3
SOME COLLEGE	( )-4
COLLEGE GRADUATE	( )-5
POSTGRADUATE WORK	( )-6
TECHNICAL SCHOOL	( )-7

K. In total, how many adult wage earners are there in your household?

PEOPLE _____ (76)

L. And finally, into which of the following brackets did your total annual household income from all wage earners before taxes fall last year? Was it ... (READ OFF)

UNDER $5,000	( )-1	$15,000 - $19,999	( )-5
$5,000 - $9,999	( )-2	$20,000 - $24,999	( )-6
$10,000 - $12,499	( )-3	$25,000 - $34,999	( )-7
$12,500 - $14,999	( )-4	$35,000 OR MORE	( )-8

(77)

INTERVIEWER: INDICATE SEX OF RESPONDENT

MALE ( )-1 FEMALE ( )-2 (78)

79-
80-